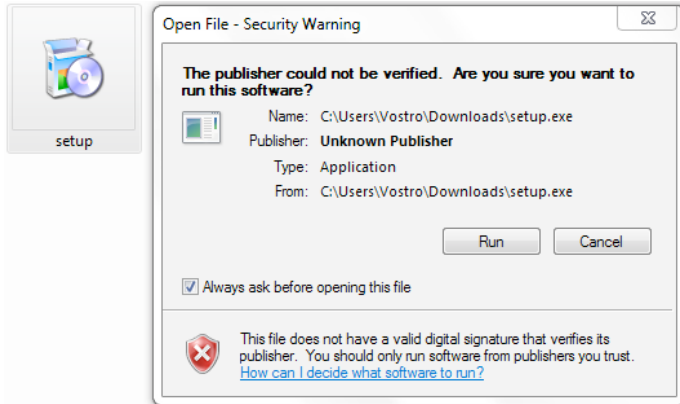# Setting up Routzy BackOffice for the first time

In the Routzy FAQ series, we offer step-by-step directions on basic and advanced Routzy functions. Consider the Routzy FAQ series as your resource guide to maximize your investment to get the most out of this robust mobile sales CRM software for your business.
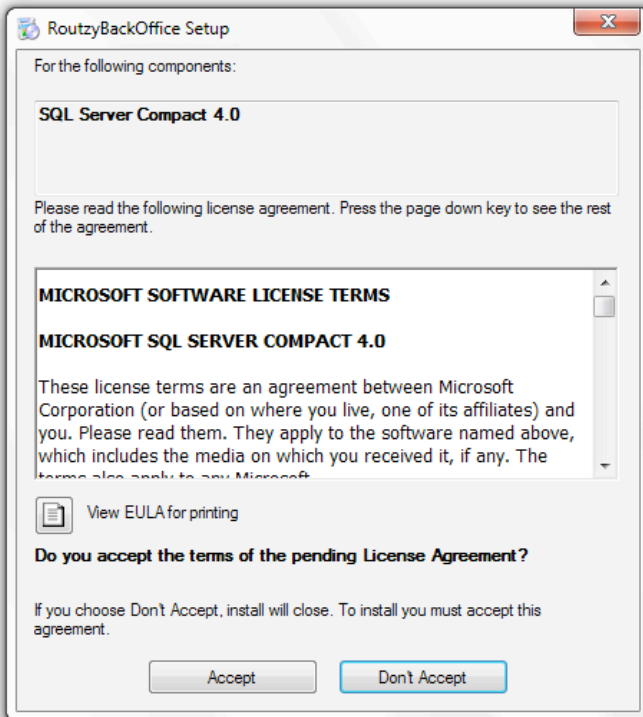
Step 1:
Download Routzy BackOffice from:
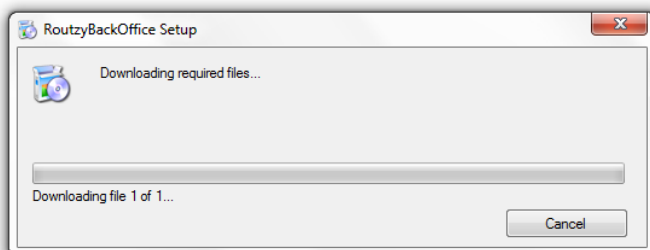http://www.routzy.com/downloads/backoffice/setup.exe

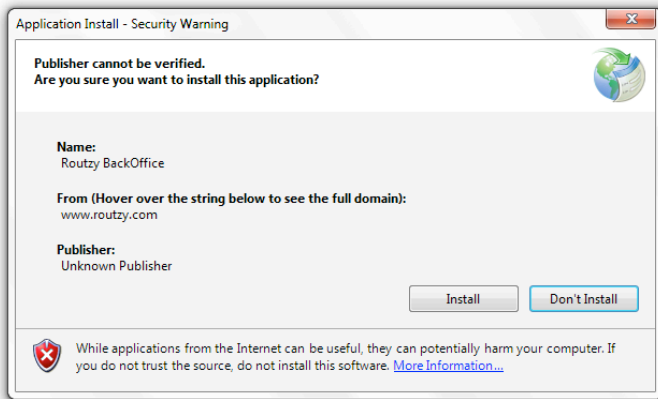Double Click the *Setup.exe* icon and **CLICK** *Run* if prompted.

Step 2:
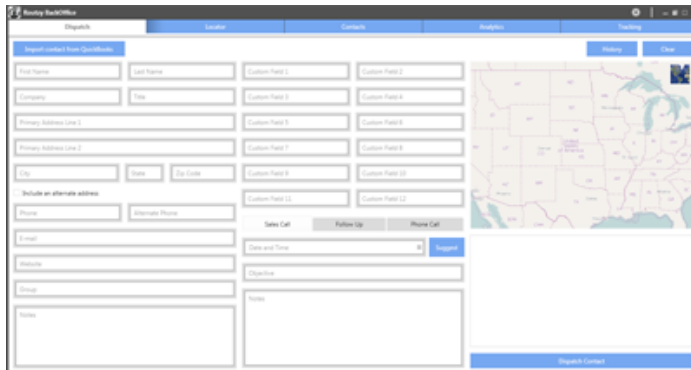You may receive a prompt to install *SQL Server Compact*. **CLICK** *Accept* to agree to the EULA and continue.

Step 3:
Your computer will begin downloading the required files.

Step 4:
When prompted **CLICK** *Install* to install Routzy BackOffice on your computer.

After the installation is complete Routzy BackOffice will open and display the *Dispatch* screen.
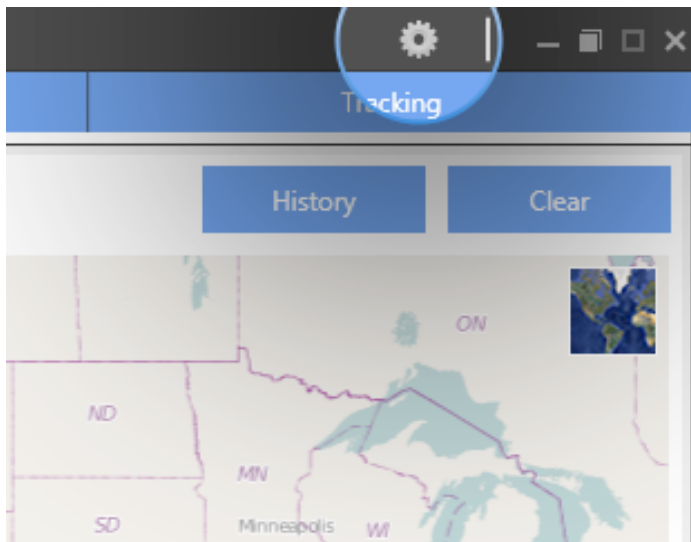
Step 5:
CLICK the *Setting (Gear) Icon.*
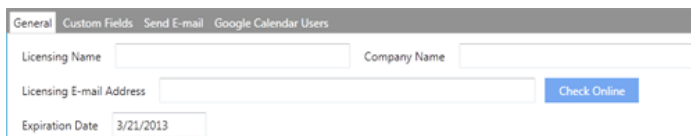
Step 6:
TYPE in your *Name, Company Name*, and *Email address* associated with your Routzy account into the *Licensing Name, Company Name,* and *Licensing Email Address fields.*

CLICK check online to make sure your information is entered correctly.

For additional help visit **http://www.routzy.com** or contact us at **help@routzy.com**

Dropbox Path C:\Users\Vostro\Dropbox\   Change   ☐ Use Dropbox Root Folder

Step 7:
CLICK change next to the *Dropbox Path* field.

Browse For Folder   ✕

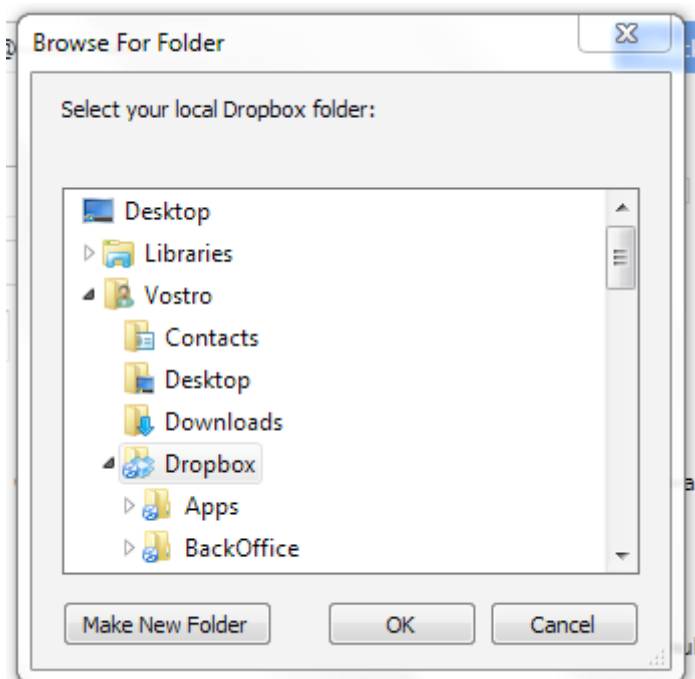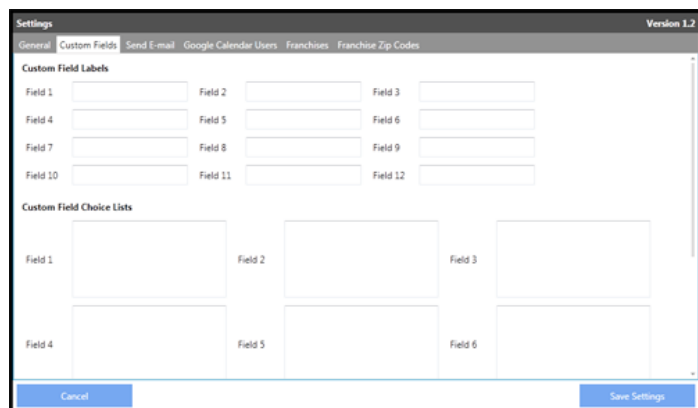Select your local Dropbox folder:

- 🖥 Desktop
  - ▷ 📚 Libraries
  - ▲ 📁 Vostro
    - 📇 Contacts
    - 📁 Desktop
    - ⬇ Downloads
    - ▲ 📦 Dropbox
      - ▷ 📁 Apps
      - ▷ 📁 BackOffice

[Make New Folder]   [OK]   [Cancel]

Step 8:
CLICK the *Dropbox folder* and **CLICK** *Ok.*

Note: This is typically located at:
C:/Users/Computer Name/Dropbox

Settings   Version 1.2

General | Custom Fields | Send E-mail | Google Calendar Users | Franchises | Franchise Zip Codes

Custom Field Labels

Field 1 [_____]   Field 2 [_____]   Field 3 [_____]
Field 4 [_____]   Field 5 [_____]   Field 6 [_____]
Field 7 [_____]   Field 8 [_____]   Field 9 [_____]
Field 10 [_____] Field 11 [_____] Field 12 [_____]

Custom Field Choice Lists

Field 1 [_____]   Field 2 [_____]   Field 3 [_____]

Field 4 [_____]   Field 5 [_____]   Field 6 [_____]

[Cancel]   [Save Settings]

Step 9:
If you use *Custom Fields* in Routzy. **CLICK** the *Custom Fields* tab at the top of the *Settings window*. Match the custom fields by **TYPING** the custom field name into the corresponding field. Once completed **CLICK** *Save.*

For additional help visit **http://www.routzy.com** or contact us at **help@routzy.com**