

Converting Your Data into Boulevard online



Important Note: If you are within a trial period for Boulevard online, you will waive any remaining days in your free trial once your conversion has been completed. You can **import contacts** before converting to see if Boulevard will be a good fit for your business.

After you've uploaded the data, please do not add additional information to your previously used software. Any additional information added **will not be included** in the conversion. Also, any information you add to Boulevard online before the conversion is completed **will be overwritten**.

Converting From Boulevard® Installed Software

If you would like your data converted into Boulevard online, please follow the instructions below to send us a backup.

1. Begin by taking a **Back up of your Boulevard Data File**.
2. Click on the link to create a message from our **Support Center**.
3. Enter your email address and a subject.
4. In the message, please include which of the following groups of contacts you'd like to be converted:
 - **All Customers** (or specify just **Active Customers** if you do not want *Inactive customers converted or those invoiced after a specific date*)
 - **Unit list**
 - **Address list**
 - or **All Contacts** if you would like contacts from all lists included (including inactive).
5. Click the **Add file** link, and navigate to where your backup is stored.
6. Select the backup file, then click **Open** to attach it (*the file name should be similar to BLVD BACKUP_YYYY-MM-DD_HHMMSS.ZIP*).
7. Click the **Submit** button to send it.

After you upload your current backup file, we will let you know it was received. In addition to the contacts you've chosen to be converted (*along with their history*), your inventory, product purchase history, and expenses will also be included during the conversion process.

Converting From UnitWise®

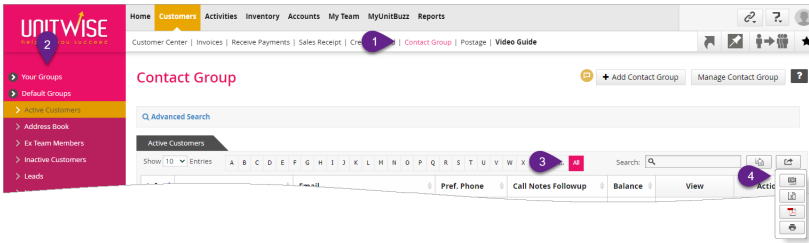
The following instructions will guide you through exporting the necessary files from your UnitWise account to be converted to Boulevard online. Please **contact us** if you would prefer to have us export your data for you.



Contacts:

Decide which contacts from your UnitWise account you would like converted to Boulevard based on the following types: **Active Customers, Inactive Customers, Consultants, Former Consultants, and All Others**.

1. From the top navigation menu, select **Customers**, then **Contact Group**.


- From the sidebar navigation menu, select **Default Groups** or **Your Groups**, then select the contact group you want to export from the options listed.
- From the toolbar, click **All** to ensure all contacts in the group will be included in the exported file.



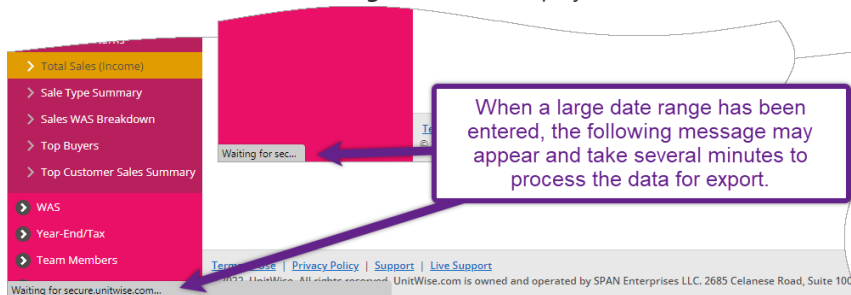
- Click  then select  to export in a CSV file format.
- The default file name is Contact Group.csv; however, you'll want to change the name. For clarity during the conversion, we recommend naming each group mentioned above, like **ActiveCustomers.csv**, **InactiveCustomers.csv**, **Consultants.csv**, **FormerConsultants.csv**, or **AllOthers.csv**.
- Repeat Steps 2 through 5 until each contact group has been exported.

Contact Product History:

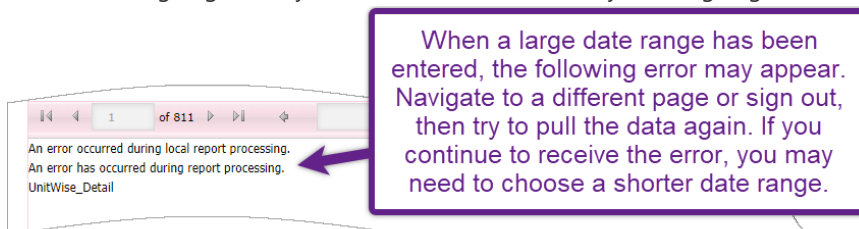
If you would like the product purchase history for your contacts included in the conversion (referred to as invoices in Boulevard), follow the steps below to export the **Products Sold to Customers**, **Total Sales (Income)**, and the four **Bulk Edit For Products** report files (Current and Discontinued Section 1 & 2). There should be a total of 6 files exported.

 **Important Note:** Due to the issues the UnitWise site has when trying to export large amounts of data and to help ensure the conversion imports properly, **we recommend exporting only the past 5 years or so** of contact purchase history.

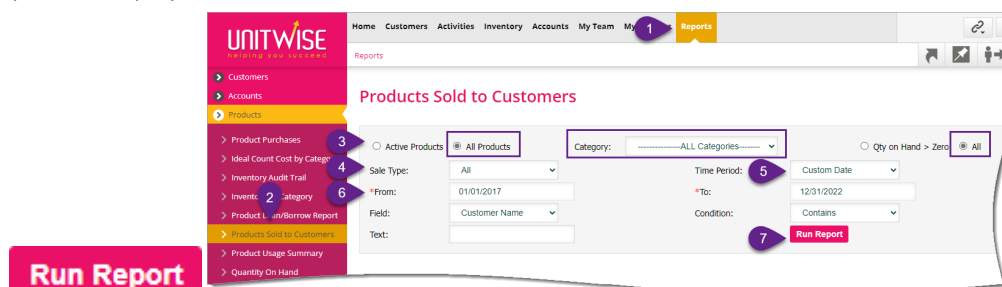
Depending on the amount of data retrieved, these reports may take several minutes before populating. At first, you may only see a small gray box in the lower left-hand corner of the webpage with the message that states, **Waiting for secure.unitwise.com...** or **Waiting for a sec...** displayed.




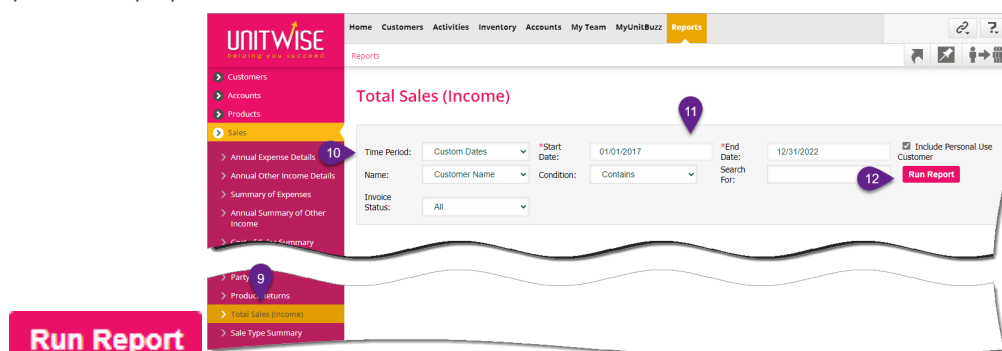
If you receive the following message, **"An error occurred during local report processing"**, when pulling reports, we recommend signing out of your UnitWise account entirely, then signing in to run the reports again.



1. From the top navigation menu, select **Reports**.
2. Select **Products** from the sidebar navigation menu, then **Products Sold to Customers**.
3. Please ensure the following options are selected: **All Products**, **All Categories**, and **All**.
4. From the **Sale Type** drop-down options, select **All**.
5. From the **Time Period** drop-down menu, select **Custom Dates**.
6. In the **Start Date** and **End Date** fields, enter the date range for all the history you would like to include, such as 01/01/2018 to 12/31/2022.




7. Click **Run Report**.
8. Once the report has populated, click  then select **Excel** from the drop-down menu to save the **xls** file.
9. Select **Sales** from the sidebar navigation menu, then **Total Sales (Income)**.
10. From the **Time Period** drop-down menu, select **Custom Dates**.
11. In the **Start Date** and **End Date** fields, enter the date range for all the history you would like to include, such as 01/01/2018 to 12/31/2022.



12. Click **Run Report**.
13. Once the report has populated, click  then select **Excel** from the drop-down menu to save the **xls** file.

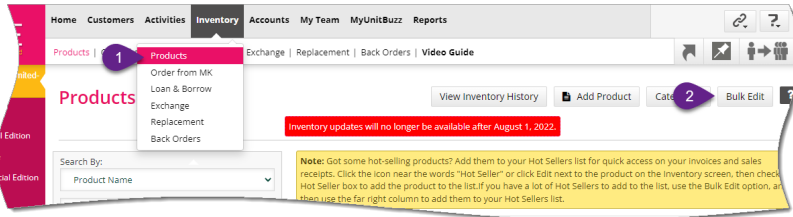
Products: (Necessary For Contact Product History)

 **Important Note:** When downloading each of the four **Bulk Edit for Products.csv** files, ensure that you rename each to specify which products are included (e.g., **Section1-current.csv**, **Section2-current.csv**, **Section1-discontinued.csv**, and **Section2-discontinued.csv**).


1. From the top navigation menu, select **Inventory**, then **Products**.

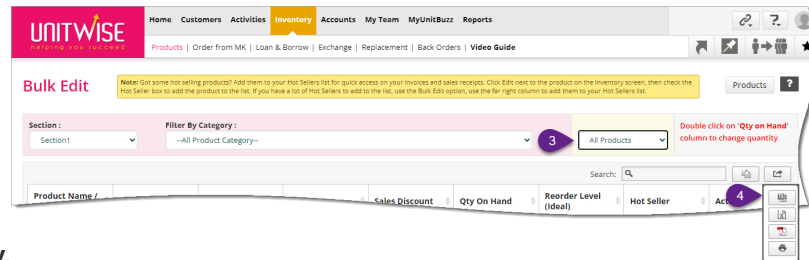
2. From the row of buttons at the top of the screen, select

Bulk Edit



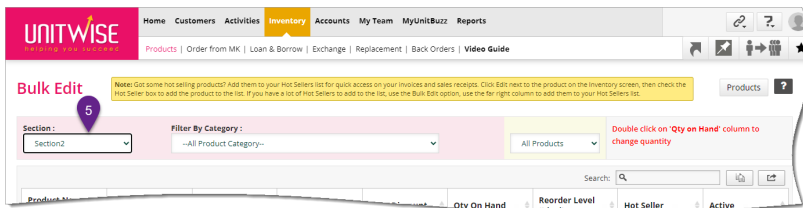
3. From the **Section** drop-down menu, ensure **Section1** is selected, then from the last drop-down menu, select **All Products**.



4. Once the section 1 products populate, click  then select  to download and rename the file to



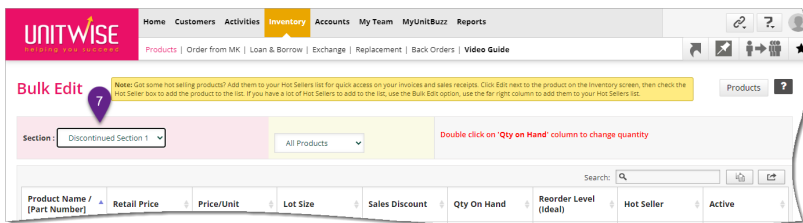
Section1-current.csv.



5. After downloading the current section 1 products, from the **Section** drop-down menu, select **Section2**, (ensure **All Products** is still selected from the drop-down menu).



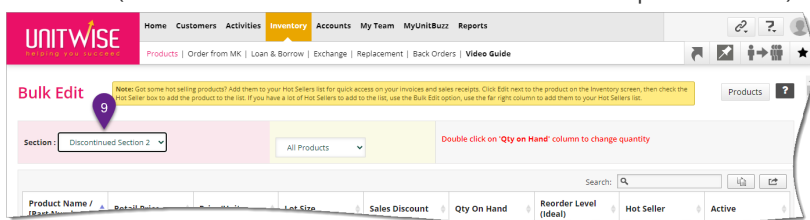
6. Once the section 2 products populate, click  then select  to download and rename the file to **Section2-current.csv.**



7. After downloading the current section 2 products, from the **Section** drop-down menu, select **Discontinued Section 1** (ensure **All Products** is still selected from the drop-down menu).



8. Once the discontinued section 1 products populate, click  then select  to download and rename the file to **Section1-discontinued.csv.**

9. After downloading the discontinued section 1 products, from the **Section** drop-down menu, select **Discontinued** **Section 2** (ensure **All Products** is still selected from the drop-down menu).

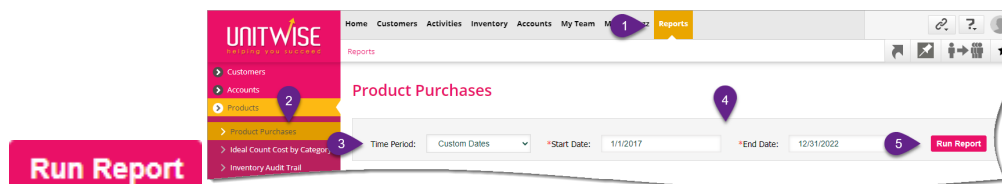


10. Once the discontinued section 2 products populate, click  then select  to download and rename the file to **Section2-discontinued.csv**.

Product Purchase Totals:

If you would like the order information from inventory product orders that you've placed with the company included in the conversion (referred to as Inventory Orders in Boulevard), follow the steps below.

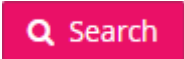
1. From the top navigation menu, select **Reports**.
2. From the sidebar navigation menu, select **Products**, then **Product Purchases**.
3. From the **Time Period** drop-down menu, select **Custom Dates**.
4. In the **Start Date** and **End Date** fields, enter the date range for all the history you would like to include, such as 01/01/2018 to 12/31/2022.



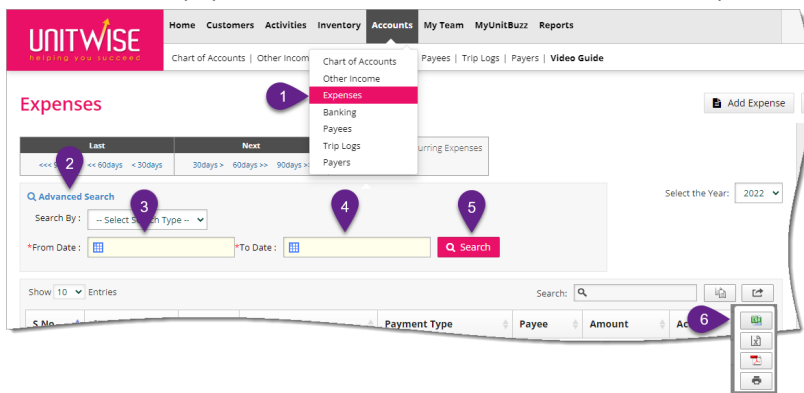
5. Click .
6. Once the report has populated, click  then select **Excel** from the drop-down menu to save the **xls** file.

Expenses:

If you would like your expenses included in the conversion, follow the steps below to export the **Expenses.csv** file.

1. From the top navigation menu, select **Accounts**, then **Expenses**.
2. Click the **Advanced Search** link.
3. In the **From Date** field, use the calendar picker to navigate and select the date of the first expense ever entered.
4. In the **To Date** field, use the calendar picker to navigate and select the date of the last expense entry ever entered.
5. Click .

6. After the entries populate, click  then select  to export in a CSV file format (Expenses.csv).



Upload UnitWise Excel Files for Conversion:

1. Click on the link to create a message from our [Support Center](#).



Note: If you are uploading more than 5 files, you must sign in (*upper righthand corner*) before continuing with the steps below or submit your files in more than one message.

2. Enter your email address and a subject.

3. In the message, please include which of the following groups of contacts you'd like to be converted:

- **Active Customers**
- **Inactive Customers**
- **Consultants**
- **Former Consultants**
- **All Others**

4. If you would also like expenses and product purchase totals, please include that in the message as well.

5. Click the **Add file** link, and navigate to where your UnitWise Excel files are stored.

6. Select the files, then click the **Submit** button to send.

If you have any questions, need further assistance, or have **not received a reply from us within 24 hours** that your data has been received, please [visit us on chat](#) or, after hours, [send us a message](#).
