



Get Started using Boulevard Step-by-Step

Thank you for choosing to use Boulevard online for your business! We recommend beginning with the steps below and the **Getting Started** section of our online help center. Many articles include short videos to help guide you as you learn your new software.

View support articles inside Boulevard using the **Help widget** in the

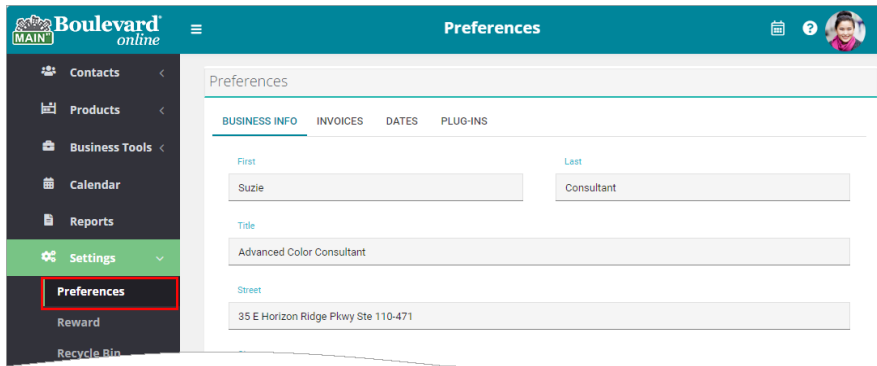
application's lower-left corner by clicking  to search, or view them full-size in a separate browser tab by clicking  from the top navigation bar.



To access your newly created account, click on the following link, or from any web page, type **blvd.online**. If you have any questions, check out the **Popular Topics**, **send us a message**, or **visit us on chat**.

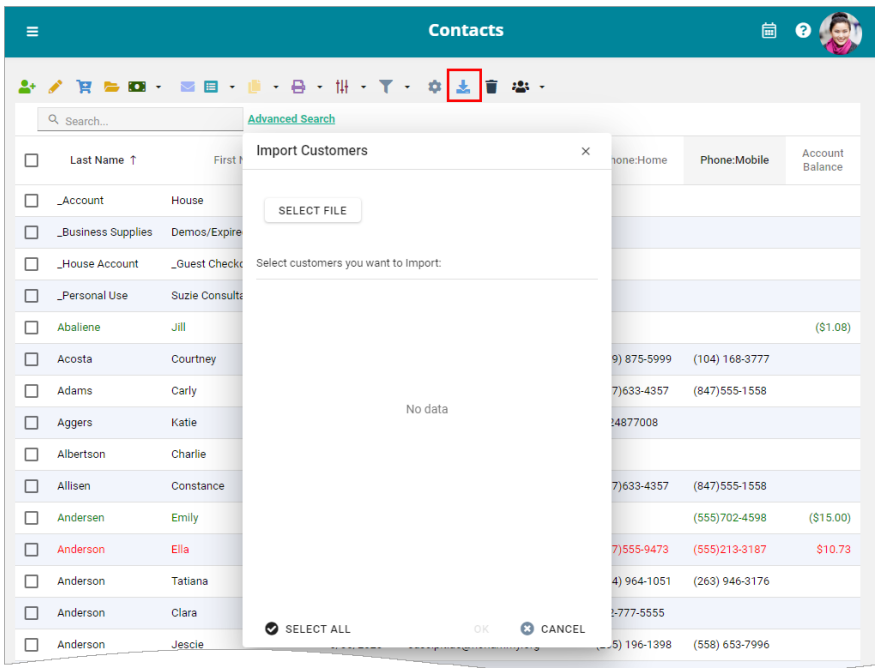
Step 1: Preferences & Settings

The Preferences area of Boulevard is where you add your personal information and tailor Boulevard to your business. See the **Customizing Boulevard** section for detailed information about the options, settings, and other fields included.



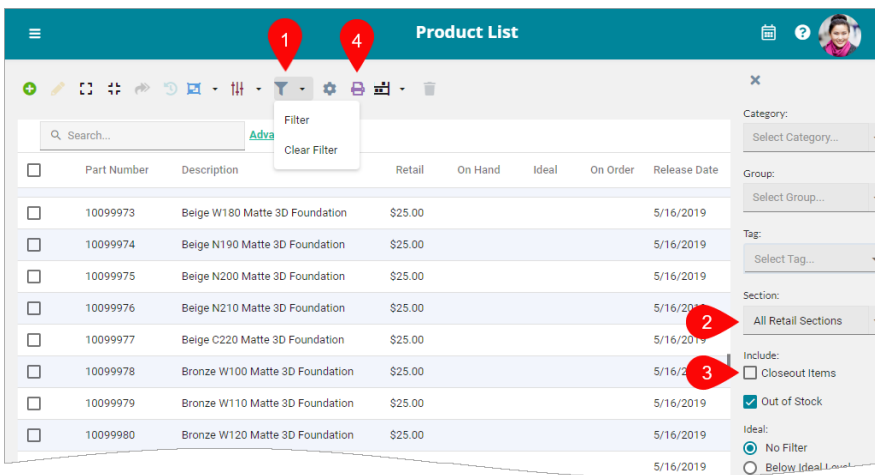
Step 2: Adding Contacts

You can import contacts from a file and **create new contact profiles** as needed.



Step 3: Entering Your Current On-Hand Inventory

You can **print an inventory worksheet and then take a physical count** of your on-hand inventory and then enter it into Boulevard following one of the options below or **import product orders** from the company website from up to two years in the past.



To add your current base inventory (instead of importing past product orders as mentioned above), we recommend viewing the videos for both methods and then deciding which option you prefer. See **Entering Your Base Inventory** for detailed instructions.

Entering Your Base Inventory (Option 1)

Option 1 will guide you through adding the amounts directly to the On Hand field of the product list.

Product List

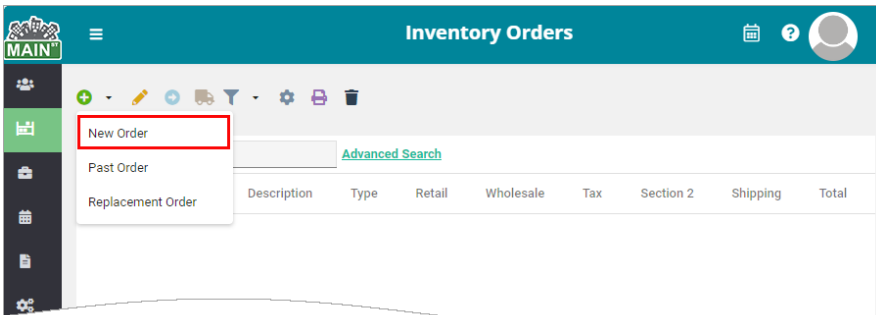
Q Search... [Advanced Search](#)

<input type="checkbox"/>	Part Number	Description	Retail	On Hand	Ideal	On Order	Release Date	Closeout Date
<input type="checkbox"/>	10173101	3D 4-in-1 Cleanser (Normal/Dry)	\$26.00	5			11/16/2020	
<input type="checkbox"/>			\$26.00	4			5/16/2018	
<input type="checkbox"/>			\$24.00					
<input type="checkbox"/>			\$34.00	-2			11/16/2020	
<input type="checkbox"/>			\$34.00	4			11/16/2020	
<input type="checkbox"/>			\$34.00	4			11/16/2020	

Use your tab or arrow keys to move quickly between fields to change amounts in the **On Hand** or **Ideal** fields

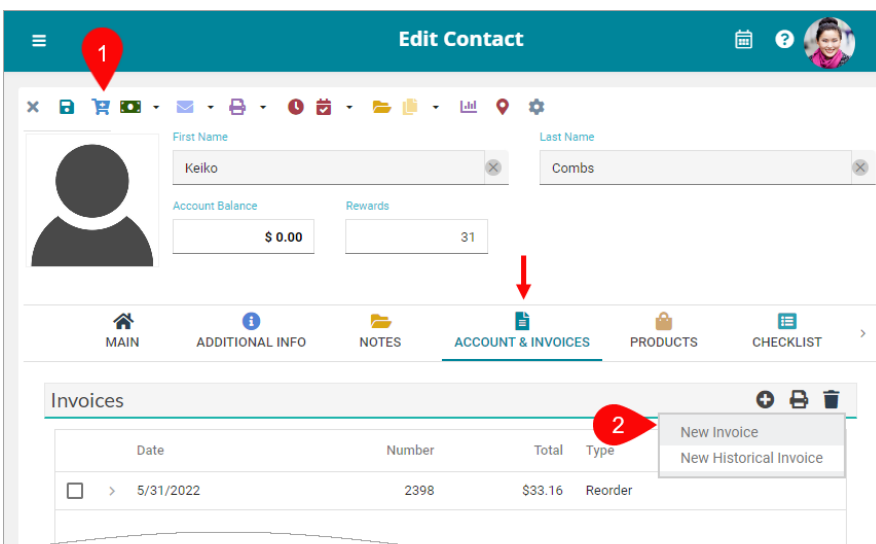
Entering Your Base Inventory (Option 2)

Option 2 will guide you through creating a Base Inventory Order that you receive into your inventory, which will then update the On Hand amounts in your product list.



Step 4: Creating Customer Invoices & Posting Payments

You can add customer purchases by **creating a new invoice**, which will reduce your inventory amounts, or by **creating historical invoices**, which will not be deducted from your inventory amounts. The sample image shows two ways to create a new invoice from inside the contact profile; however, you can also create a new invoice from the **contact list toolbar**.



Payments can be added to the invoice if the payment is made during the initial purchase. Or, if the payment was given later, it can be posted to their account from the contact list or contact profile toolbars (*as shown in the example below*). See **Posting Payments** for more information. Alternatively, if you have a ProPay account, you can **send a Direct Payment Link through email**.

Payment: Maya Chambers ×

Current Balance

▾

Date 📅 **Type** ▾ **Amount** ✓

Memo **Number**

Processing Fee

Miscellaneous

- **Add an Expense Entry or Create, Edit, or Delete Recurring Expenses**
- **Handling Personal Use**
- **Handle Demos, Donations, or Expired/Product Loss**

Additional Information:



Note: Please contact us if you've previously used the desktop/installed version of Boulevard or another software application and would like your **data converted into Boulevard online**.
