

# Get Started using Boulevard Step-by-Step

Thank you for choosing Boulevard online for your business needs! We suggest starting with the following steps and exploring the **Getting Started** section in our online help center. You'll find many articles there, including brief videos to assist you in familiarizing yourself with the new software.

Access support articles in Boulevard through the Help widget located

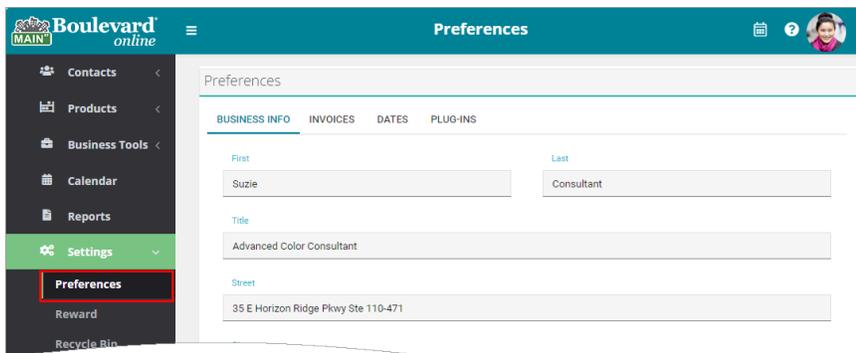
in the application's lower-left corner by clicking  to search, or view them in full-size on a separate browser tab by clicking  from the top navigation bar.



To access your newly created account, click the provided link, or type **blvd.online** into your web browser's address bar. For any inquiries, explore the **Popular Topics**, **send us a message**, or **connect with us via chat**.

## Step 1: Preferences & Settings

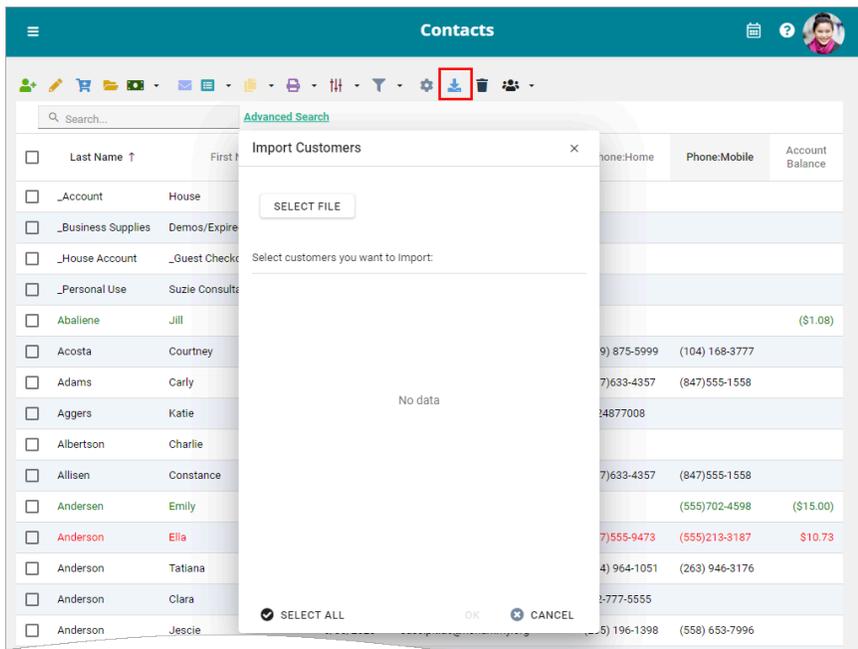
In Boulevard, the Preferences section is designed for you to enter your personal details and customize the software to fit your business needs. For comprehensive details on the available options, settings, and fields, refer to the **Customizing Boulevard** section.



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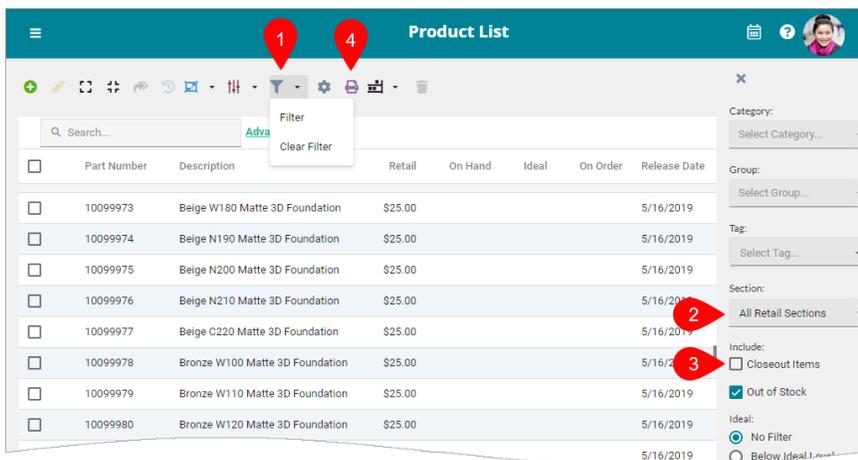
## Step 2: Adding Contacts

Contacts can be **imported from a file**, and **new contact profiles can be created** individually as needed.



### Step 3: Entering Your Current On-Hand Inventory

You can **print an inventory worksheet**, **conduct a physical count** of your on-hand inventory, and record it in Boulevard using one of the methods below. Alternatively, you can **import product orders** from the company website for up to two years.



To integrate your existing base inventory instead of importing past product orders, it's recommended that you view the tutorial videos for both methods before deciding on the most appropriate one. Consult the **Entering Your Base Inventory** article 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**

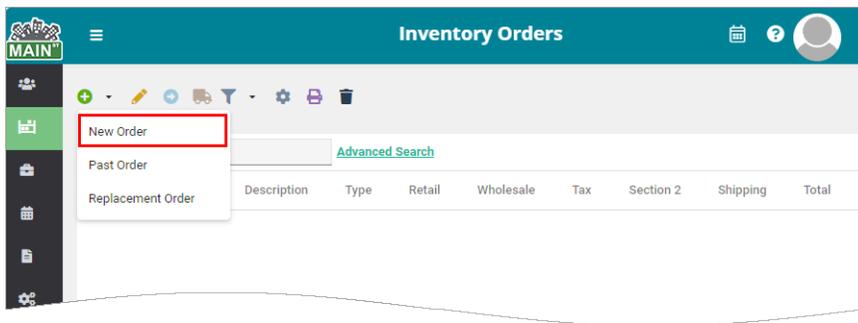
Search... [Advanced Search](#)

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

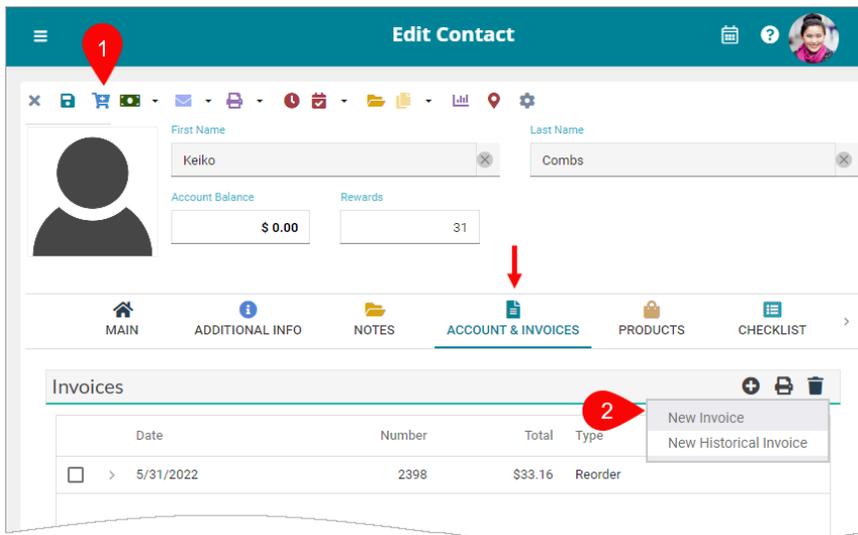
## Entering Your Base Inventory (Option 2)

**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

Customer purchases may be recorded by **creating a new invoice**, which reduces inventory levels, or by **creating historical invoices** that do not impact inventory. The image demonstrates two ways to create a new invoice within the contact profile.



Alternatively, you can start a new invoice from the profile slide-out under the **Action drop-down menu** or the **contact list toolbar**.

The screenshot shows a contact profile for Carly Adams and a list of other contacts. Callout boxes provide instructions:

- From the Profile Slide-out, get a quick view of their contact information.** (Points to the profile header area)
- You can also create an invoice, post payments and more.** (Points to the 'ACTIONS' dropdown menu)
- Click to launch an email or map directions.** (Points to the email and address fields)
- Click to expand and view their invoice or product history.** (Points to the 'Products' and 'Invoices' sections)

Last Name	First Name	Next Contact	Preferred Con
Account	House		
Business Supplies	Demos/Expired/Charity/Etc.		
House Account	Guest Checkout		
Personal Use	Suzie Consultant		
Abaliene	Jill	8/22/2024	
Acosta	Courtney	8/1/2024	TEXT (104) 168-3777
Acott	Kit	8/22/2024	
Adams	Carly	8/22/2024	
Aers	Linnie		
Aggers	Katie	8/1/2024	
Aidler	Chrysa	8/26/2024	
Aizik	Chrysler	8/26/2024	
Aland	Rachelle		
Albertson	Charlie	8/1/2024	charliesangels95636@gmail.com
Albery	Adel		
Alder	Kessiah		
Alison	Tammy	8/22/2024	(847)555-1558
Allisen	Constance	8/1/2024	(847)555-1558

Payments made at the time of the initial purchase may be included on the invoice. Alternatively, if the payment is made on a later date, it can be applied to their account via the contact list or contact profile toolbars, as illustrated below. For additional details, refer to the **Posting Payments** article. If you use ProPay for payment processing, you can email a **Direct Payment Link**.

**Payment: Maya Chambers** ✕

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**Current Balance**

\$ 18.99

**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**

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## Additional Information:



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

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