

# Tips to Having a Great Webinar Experience

- View the webinar on your computer, but call from an outside phone line for better audio.
- Ensure you're internet connection is strong.
- Live streaming uses a lot of computer memory. To help with this, ensure you've closed all applications running on your computer except for the webinar.
- Print the PDF handout for note-taking and to jot your questions down to ask during the question and answer portion of the webinar.

*The webinar will begin shortly!*



# Welcome

The following webinar will begin shortly:

## Products & Inventory

Learn about various settings, toolbar buttons on the product list and inventory orders as well as commonly used functions. We'll also cover the cleaning up your product list, loading and customizing views along with creating a Product Sales Event.



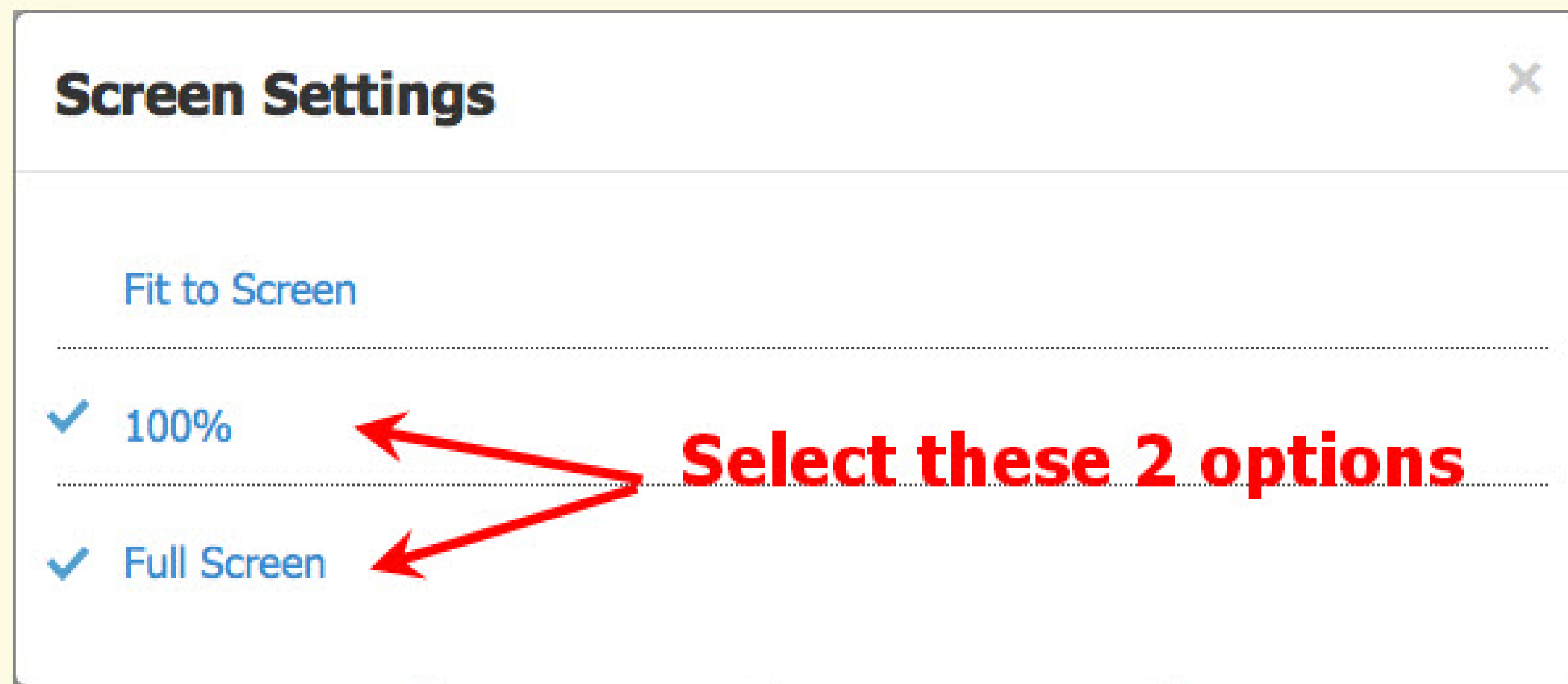
# If Boulevard looks fuzzy during the webinar...

**Fuzzy Screen? click**



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**Select these 2 options**

# Product List Filters & Settings

13

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16

17

18

Filter

Category

Group

Product Line

Section

1 and Deluxe Mi...

Include:

☒ Closeout Items

☒ Out of Stock

Ideal:

☒ No Filter

☐ Below Ideal Level

☐ Out of Stock

Filter

Settings

19

20

21

22

23

Settings

☒ Show grid lines

☐ Alternate row colors

Printing

☐ Landscape

Subtitle:

☒ Do not Track Section 2

Filter

Settings

(13) **Category:** Product order form categories

(14) **Group:** Product order form grouping based on the type of product

(15) **Product Line:** A level of grouping that coincide with brand lines

(16) **Section:** The highest level of grouping to differentiate between retail, sellable and items that are business supplies

(17) **Include:** Include items that are no longer on the current order form and/or items that are out of stock

(18) **Ideal:** Choose either no filtering, items that are below the previously set ideal level, or out of stock entirely

(19) **Show grid lines:** Display the grid lines on the form itself

(20) **Alternate row colors:** Alternate the colors of each row on the grid

(21) **Landscape:** Print the view in the landscape format

(22) **Subtitle:** Enter additional information to be printed on report

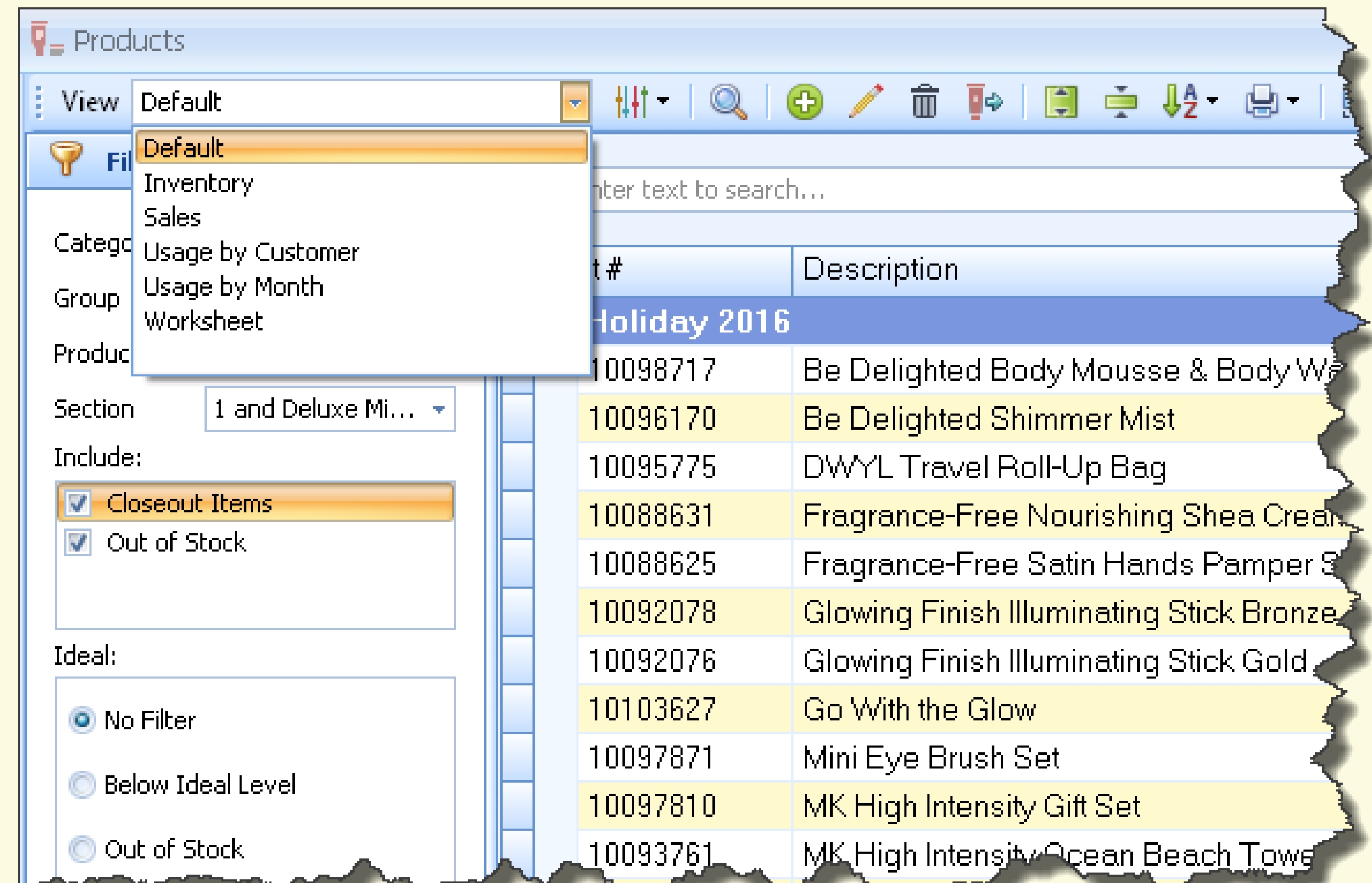
(23) **Do not Track Section 2:** Option to not track section 2 on-hand amounts *(Section 2 are business supplies - the amount spent is a tax write-off therefore it is unnecessary to track the quantities of each item.)*



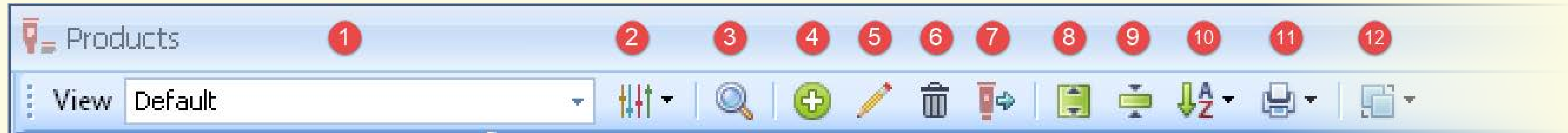
# Predefined Product List Views

There are 6 predefined views that can be displayed from the Product List.

- **Default:** Displays Part #, Description, Retail, On Hand, Ideal Discount, On Order, Release and Closeout Dates; grouped by category
- **Inventory:** Snapshot of your current on hand amounts and inventory value; grouped by category with a grand total
- **Sales:** Items sold within a specified date range; grouped by category
- **Usage by Customer:** Items sold, given and returned within a specified date range; grouped by customer
- **Usage by Month:** Items sold within a specified date range, grouped by category and by month. Includes Total and average number sold and ideal amount set
- **Worksheet:** Designed to be used when counting inventory. Includes Part #, On Hand, Ideal, Description and Group



# Product List Toolbar





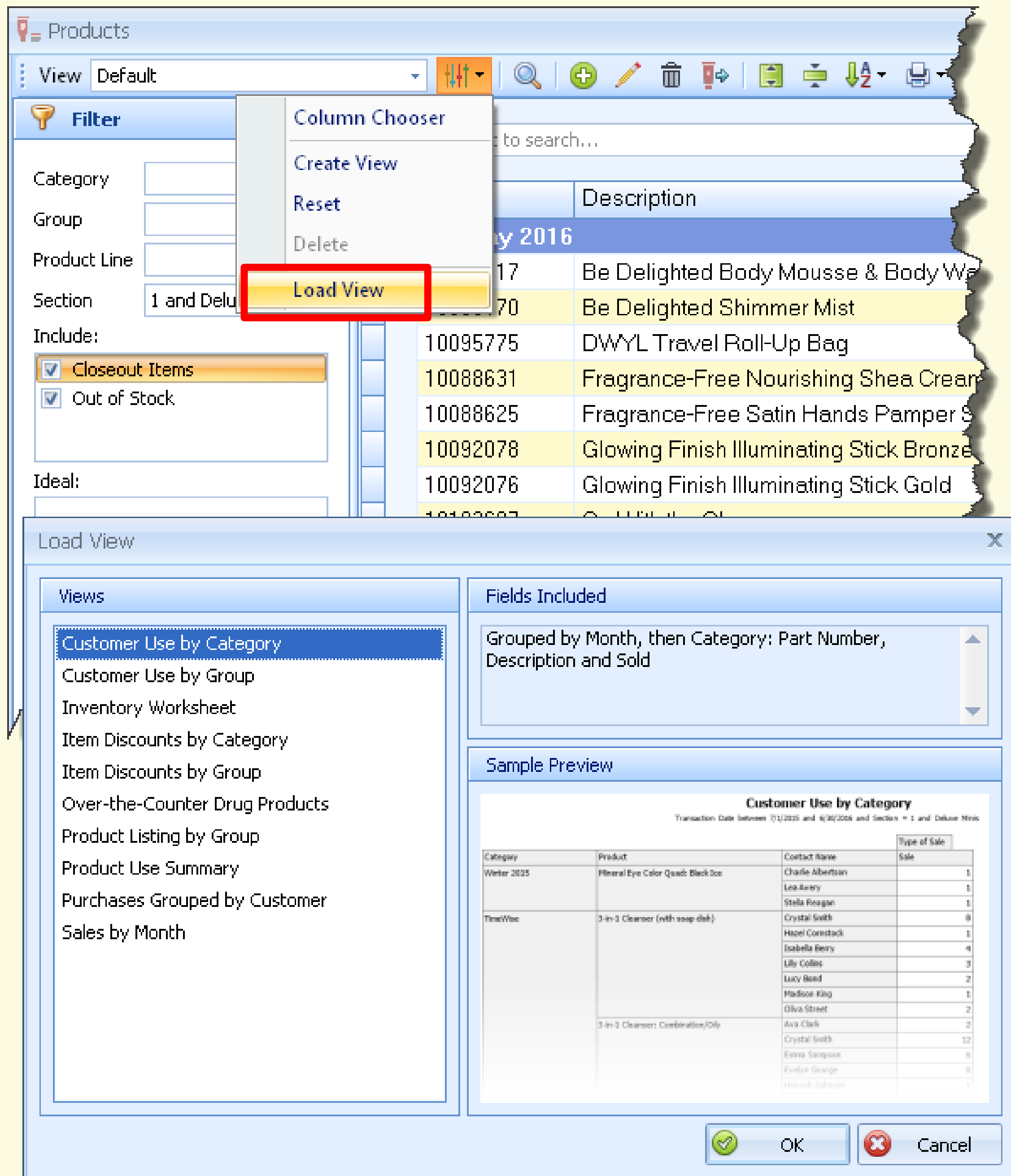
- (1) **View:** Default views include Default, Inventory, Sales, Usage by Customer, Usage by Month and Worksheet
- (2) **Customize:** Add columns using Column Chooser; create or load views as well as deleting or resetting views
- (3) **Find:** Find items on the product list
- (4) **New:** Add a new item to the product list
- (5) **Edit:** Make changes to an item on the product list
- (6) **Delete:** Delete an item on the product list *(Note: Removing an item will not remove it from a customer's sales history.)*
- (7) **Reassign History:** Merges two products together including sales history and on-hand amounts
- (8) **Expand:** Expands the categories
- (9) **Collapse:** Collapses the categories
- (10) **Sort:** Choose to sort the product list by description or order form sequence
- (11) **Print:** Drop-down option to either print or preview the current view displayed
- (12) **Grouping:** Drop-down menu to access the categories, groups and product lines.

# Adding & Moving Columns

The screenshot shows the 'Products' window in Main Street Software. On the left is a 'Filter' panel with sections for 'Include' (Closeout Items, Out of Stock) and 'Ideal' (No Filter, Below Ideal Level, Out of Stock). The main area displays a table of products. A 'Column Chooser' menu is open, showing options like 'Sort Ascending', 'Sort Descending', 'Group By This Column', 'Show Group By Box', 'Hide This Column', 'Column Chooser', 'Best Fit', and 'Best Fit (all columns)'. The table has columns for Product ID, Description, Retail, On Hand, Ideal, Discount, and Closeout Date. The bottom of the image has a torn paper effect.


	Description	Retail	On Hand	Ideal	Discount	Closeout Date
17	Be Delighted Body Mousse & Body Wash ...	\$32.00				
70	Be Delighted Shimmer Mist	\$16.00				
10095775	DWYL Travel Roll-Up Bag	\$35.00				
10088631	Fragrance-Free Nourishing Shea Cream	\$12.00				
10088625	Fragrance-Free Satin Hands Pamper Set	\$36.00				
10092078	Glowing Finish Illuminating Stick Bronze	\$12.00				
10092076	Glowing Finish Illuminating Stick Gold	\$12.00				
10103627	Go With the Glow	\$110.00				
10097871	Mini Eye Brush Set	\$15.00				
10097810	MK High Intensity Gift Set	\$26.00				2 10/1/2016
10093761	MK High Intensity Ocean Beach Towel	\$5.00	2			7/13/2016
10103628	Modern Maven	\$80.00	1			10/1/2016
10103629	Prime Candidate	\$45.00				10/1/2016

- To add columns, click  then select **Column Chooser**. Drag and drop any of the available columns onto the list.
- Drag column headers to arrange in any order, or to remove a column, right-click on the column header and choose **Hide This Column**.
- To print the view as a report, from the product list toolbar click  and choose **Print** or **Preview**.



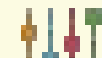


# Load Additional Views

There several optional views that can be loaded then displayed from the Product List.

1. From the Product list toolbar click  then select **Load View**.
2. Select from the available views, then click **OK**.

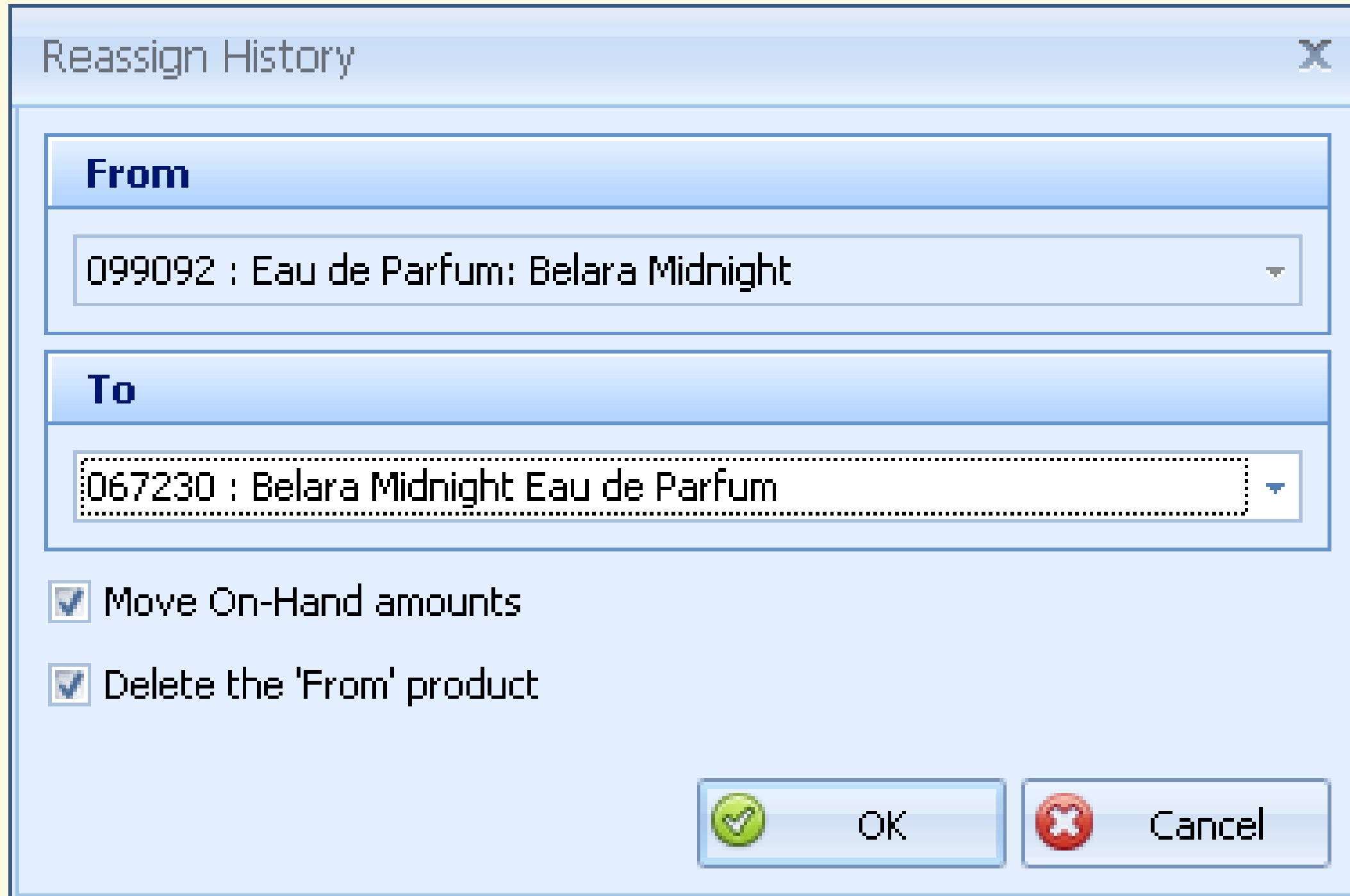
## Additional Info:

- To add additional columns click  then select **Column Chooser**. Use the drag and drop method to place columns in the desired location on the current view.
- To hide any unwanted columns, right click on the column header and select **Hide This Column**.
- Loaded and created views, can be deleted by selecting them from the **View** drop down. Click  then select **Delete** and **Yes** to confirm.
- Default views cannot be deleted, but can be reset to their original state. Click  then select **Reset** and **Yes** to confirm.



# Reassigning Product History

Reassigning product history eliminates duplicate items by merging two of the same products that have different part numbers (*e.g., same color, price, etc. but different packaging*).



Reassign History

**From**

099092 : Eau de Parfum: Belara Midnight



**To**

067230 : Belara Midnight Eau de Parfum

☒ Move On-Hand amounts

☒ Delete the 'From' product

OK Cancel

1. From the Product List tool bar, click  to locate the part number that will be eliminated, then select to highlight it (*Example: 099092*).
2. From the product list toolbar click .
3. In the **To** field enter the newer part number that the old part number will be merged into (*Example: 067230*).
4. Ensure that both **Move On-Hand amounts** and **Delete the 'From' products** check boxes are selected, then click **OK**.
5. Click **Yes** to confirm, then **OK** to acknowledge.

# Splitting Sets

For inventory tracking purposes, sets that are comprised of items that can be purchased individually, can be split. Examples include the Microdermabrasion Plus Set, Miracle Set and Satin Lips Set. (e.g., Microdermabrasion Plus Set, Miracle Sets and Satin Lips Sets, etc.)

**Product**



Part Number: 106784  
Description: Ultimate Miracle Set: Normal/  
Category: TimeWise  
Group:   
Line: TimeWise  
Retail/Cost: \$182.00  
Pkg of: 1  
Per Unit:   
☒ Taxable  
☐ No Inve

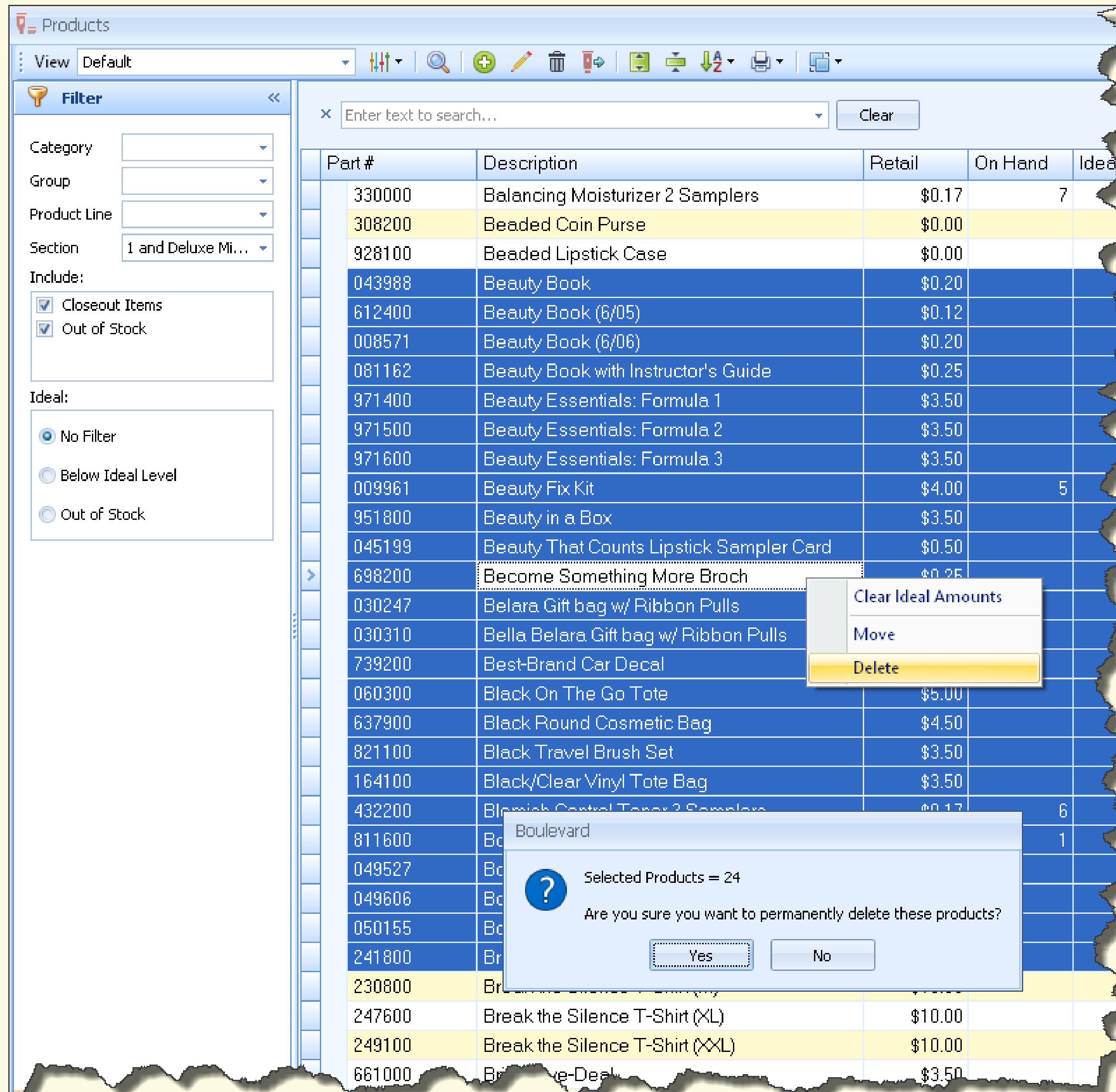
**Split Set**

Set Contents:

Part	Description	Qty	Wholesale
> 026940	3-In-1 Cleanser: Normal/Dry	1	\$10.00
026925	Age-Fighting Moisturizer Normal/Dry	1	\$12.00
072656	Day Solution Broad Spectrum SPF 35	1	\$12.75
026919	Night Solution	1	\$12.75
082650	Firming Eye Cream	1	\$16.00
081606	Microdermabrasion Refine	1	\$15.00
081607	Pore Minimizer	1	\$12.50


OK Cancel

1. Open the product profile of the set to be split  
(If necessary, click  from the product list toolbar, and enter a partial description or part number of the item).
2. From the product profile toolbar, click  to open the *Split Set* form.
3. Enter the number of sets to be split, and if necessary adjust the Wholesale amount.
4. When finished, **OK** to accept and close the form.

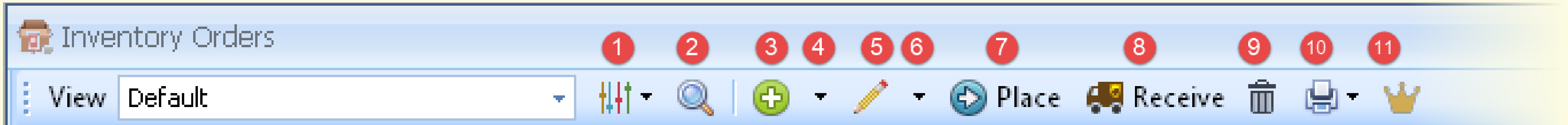


## Deleting Multiple Products

Products that are no longer available to be ordered can be permanently deleted from Boulevard. Any past purchase history will be retained in the contact's history.

1. Select the first product to delete.
2. From your keyboard, hold the **Shift** key, then click on the last product in the range to be deleted.
3. From the product list toolbar, click .
4. Click **Yes** to accept and close the form.

Tip: To move a group of products instead of deleting, after selecting a range, right click then choose Move.



## Inventory Orders Toolbar

- (1) Allows additional columns to be added (*reserved for future use.*)
- (2) Searches the Description column when a partial description is entered
- (3) Opens an order form to create a new order
- (4) Select **Replacement Order** from the drop-down to initiate a replacement order from previously returned items
- (5) Opens the selected order to allow changes to the order to be made
- (6) Select **Edit Mode** from the drop-down menu to put the inventory order grid into edit mode. Allows the fields to be edited directly from the Inventory Order form with the exception of the Order Type field and Section 1 Tax on EZShip or Guest Checkout type orders. Changes made will automatically be saved when tabbing out of each cell.
- (7) Marking an order as placed, puts it into a pending state. The quantities ordered are then added to each item's On Order field  
(*This function should be done after submitting the order to company.*)
- (8) After the order has been delivered, this function opens the Receive Order form to make any necessary adjustments, then update the on hand amounts in Boulevard.
- (9) Deletes the order from Boulevard. If the order has been placed, it removes all quantities from the On Order field for each product. No inventory changes are made if a completed order is deleted, only the value of the order is removed and will no longer be reflected on the Annual Product Purchases report.
- (10) Prints or previews the selected order
- (11) Opens the Queen's Court form showing a list of all product order totals for tracking progress toward the Queen's Court of Personal Sales. It also shows the total retail value of all orders and the Queen's Court qualifying amount.



# Inventory Order Form Filters & Settings

Indicates an Open order

Date	Description
8/8/2016	August
8/5/2016	August
7/13/2016	July
7/10/2016	July
6/20/2016	June
5/16/2016	May
3/23/2016	Replacem
3/17/2016	Replacem
3/10/2016	March Fill in
3/2/2016	March
2/20/2016	Feb fill in
2/1/2016	February
1/10/2016	Start of Y

(12) **Date Range:** Filter the date range using *Quick Dates* or set a custom date range

(13) **Status:** All, Open or Closed orders

(14) **Type:** All, **Standard** (default product order type), **EZShip** (Orders that have come from your website or a sales ticket that will be shipped directly from the company), **Guest Checkout** (Orders that have come from your website from consumers that have not registered on your site that will be shipped directly from the company), or **Replacement** (System created orders when a Product Replacement has been generated and accepted)

(15) Discount percent used even if the order is below the typical discount threshold

(16) After the order has been received into inventory an expense entry will be made for the shipping cost

(17) Calculates tax on the shipping cost

(18) Prints in the same sequence as the consultant order form

(19) If the order qualifies to earn Biz Builder Bucks, the amount will be handled and reflect automatically (US Only)

Settings

- ☒ Default discount 50.00 %
- ☒ Add Expense entry for freight
- ☒ Add tax for freight
- ☒ Print in order form sequence
- ☒ Track BizBuilder Bucks

# Create a Sales Event

Product Sales Events										
Description	Start	End	Discount	Points		Part #	Description	Discount	Points	Category
> At Play Inventory Reduction Sale	10/1/2016		30.00 %	0		> 10062150	At Play Baked Eye Trio: Neapolitan	30.00 %	0	Mary Kay At Play
New Product Launch	11/16/2016	11/30/2016	0.00 %	50		10081938	At Play Baked Eye Trio: Out of the Blue	30.00 %	0	Mary Kay At Play
Valentines	2/1/2016	2/28/2016	15.00 %	0		10081940	At Play Baked Eye Trio: Purple Eclipse	30.00 %	0	Mary Kay At Play
January	1/1/2016	1/31/2016	30.00 %	0		10062148	At Play Baked Eye Trio: Sunset Beach	30.00 %	0	Mary Kay At Play
November	11/1/2016	11/30/2016	10.00 %	0		10064905	At Play Eye Crayon: Gold Mine	30.00 %	0	Mary Kay At Play
Compact Filled	10/1/2016	10/31/2016	20.00 %	0		10069229	At Play Eye Crayon: Over the Taupe	30.00 %	0	Mary Kay At Play
Lipstick	7/17/2016	7/31/2016	15.00 %	0		10069230	At Play Eye Crayon: Teal Me More	30.00 %	0	Mary Kay At Play
July	7/1/2016	7/31/2016	20.00 %	0		10074049	At Play Fluid Eyeliner: Blue My Mind	30.00 %	0	Mary Kay At Play
June	6/1/2016	6/30/2016	15.00 %	0		10074053	At Play Fluid Eyeliner: Gold Metal	30.00 %	0	Mary Kay At Play
Closeout Items	5/1/2016	8/1/2016	40.00 %	0		10074051	At Play Fluid Eyeliner: Hello Violet	30.00 %	0	Mary Kay At Play
May	5/1/2016	5/31/2016	25.00 %	0		10074050	At Play Fluid Eyeliner: The Real Teal	30.00 %	0	Mary Kay At Play

Product Sale Event

Description: At Play Inventory Reduction Sale

Start Date: 10/1/2016

End Date:

Defaults

Discount: 30.00 %

Reward Points: 0

OK Cancel


1. From the main toolbar click (or from the Product menu, select Sales Events).
2. On the *Sales Events* toolbar, click .
3. Fill in the event **Description**, **Start** and **End Date**, and **Discount** (in addition or instead of a percent discount, Rewards points can be assigned).
4. Click **Ok** to save and close the form.

# Add Products to a Sales Event

The screenshot shows the 'Product Sales Events' window. On the left, a 'Product Lookup' dialog box is open, displaying a list of products with columns for P/N, Description, On Hand, and On Order. The 'Category' is set to 'Mary Kay At Play' and the 'Group' is 'All Groups'. The 'Add' button is highlighted. On the right, the main 'Product Sales Events' table is visible, showing a list of events with columns for Description, Start, End, Discount, and Points. The 'At Play Inventory Reduction Sale' is selected.

Description	Start	End	Discount	Points
At Play Inventory Reduction Sale	10/1/2016		30.00 %	0
New Product Launch	11/16/2016	11/30/2016	0.00 %	50
Valentines	2/1/2016	2/28/2016	15.00 %	0

Part #	Description	Discount	Points	Category
10062150	At Play Baked Eye Trio: Neapolitan	30.00 %	0	Mary Kay At Play
10081938	At Play Baked Eye Trio: Out of the Blue	30.00 %	0	Mary Kay At Play
10081940	At Play Baked Eye Trio: Purple Eclipse	30.00 %	0	Mary Kay At Play
10062148	At Play Baked Eye Trio: Sunset Beach	30.00 %	0	Mary Kay At Play
10064905	At Play Eye Crayon: Gold Mine	30.00 %	0	Mary Kay At Play
10069229	At Play Eye Crayon: Over the Taupe	30.00 %	0	Mary Kay At Play
10069230	At Play Eye Crayon: Teal Me More	30.00 %	0	Mary Kay At Play
10074049	At Play Fluid Eyeliner: Blue My Mind	30.00 %	0	Mary Kay At Play
10074053	At Play Fluid Eyeliner: Gold Metal	30.00 %	0	Mary Kay At Play
10074051	At Play Fluid Eyeliner: Hello Violet	30.00 %	0	Mary Kay At Play
10074050	At Play Fluid Eyeliner: The Real Teal	30.00 %	0	Mary Kay At Play

1. From the *Sales Events* toolbar, click  to add items by including entire categories, groups or individual items to the event.
2. From the Product Lookup form, use the drag and drop method to include items to the event or click **Add**.
3. When finished, click **Close**.

# Questions?

## We're Happy to Answer Them!

- This is a live broadcast; so that everyone may hear you, please ensure you're in a quiet area.
- We want to respect everyone's time and try to answer as many questions as possible. Please keep the questions to the topics covered.
- Dial \*6







## Additional Questions?

Email, Facebook post or tweet a message using the hashtag:

# #Inventory

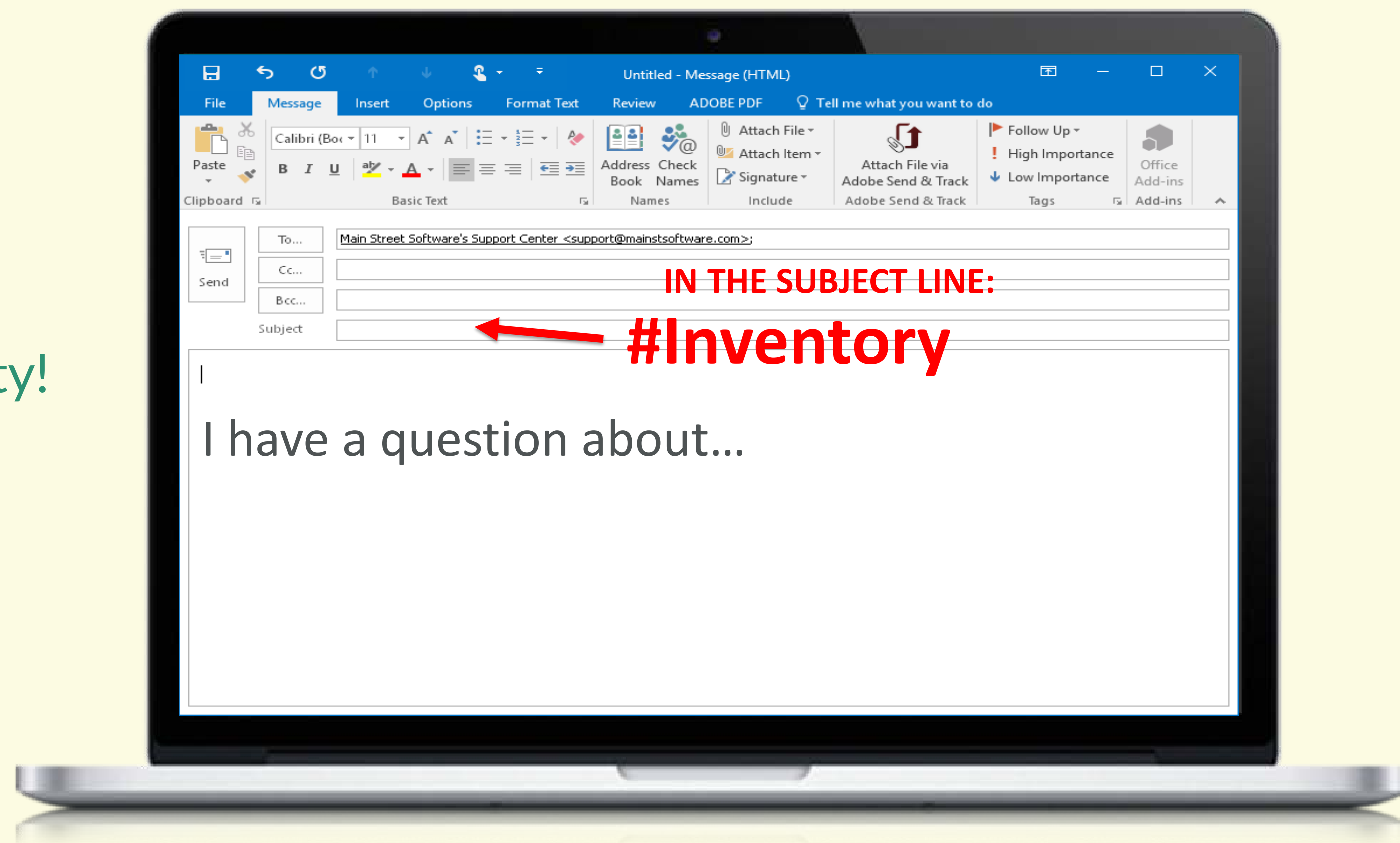
Your question will receive top priority!



## Upcoming Webinar

### Getting a Fresh Start in Boulevard

- Customers
- Inventory
- Entering historical info (company product orders, customer sales and expenses)



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