



User Guide

Archiving Orders in ShipWorks

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Archiving Orders in ShipWorks

Background

ShipWorks version 5.24 or later gives you the ability to archive orders into an archive database. This can be very helpful if you wish to remove orders from your main ShipWorks database, but would still like to be able to easily access your order history.

- Perhaps you have very old orders that no longer need to be accessed on a daily basis, but you wish to keep your ShipWorks order history for future reference.
- Perhaps you need to free up database space. You can move orders from your main ShipWorks database into an archived database, allowing you to free up database space and be able to view your archived orders in your archive database.

When you archive orders, the orders you select are removed from the active ShipWorks database and moved into a new archive database which you can easily access at any time. This article will guide you through how to archive orders in ShipWorks.

First Things First

Before you can work with archives in ShipWorks, there are a couple things that you need to have in place:

- You will need to be on ShipWorks version 5.24 or later. You can easily see what version of ShipWorks you are running by clicking on the **Help** tab and then on the **About ShipWorks** button. If you need assistance with upgrading your version of ShipWorks, [please see this article](#).
- You need to be logged into ShipWorks as a user with administrator rights.



Things to Consider

Prior to archiving orders in ShipWorks, there are a few important things to make note of:

! Archiving cannot be undone. Once the orders are archived and removed from the main ShipWorks database, they cannot be merged back into the main ShipWorks database from the archive.

! Archived orders can be viewed only. The archived orders cannot be edited nor can new shipments be processed.

! During the archiving process, ShipWorks will not be available to use. We recommend performing the archive during a time when the ShipWorks software is not being used.

When [working in a ShipWorks archive database](#):

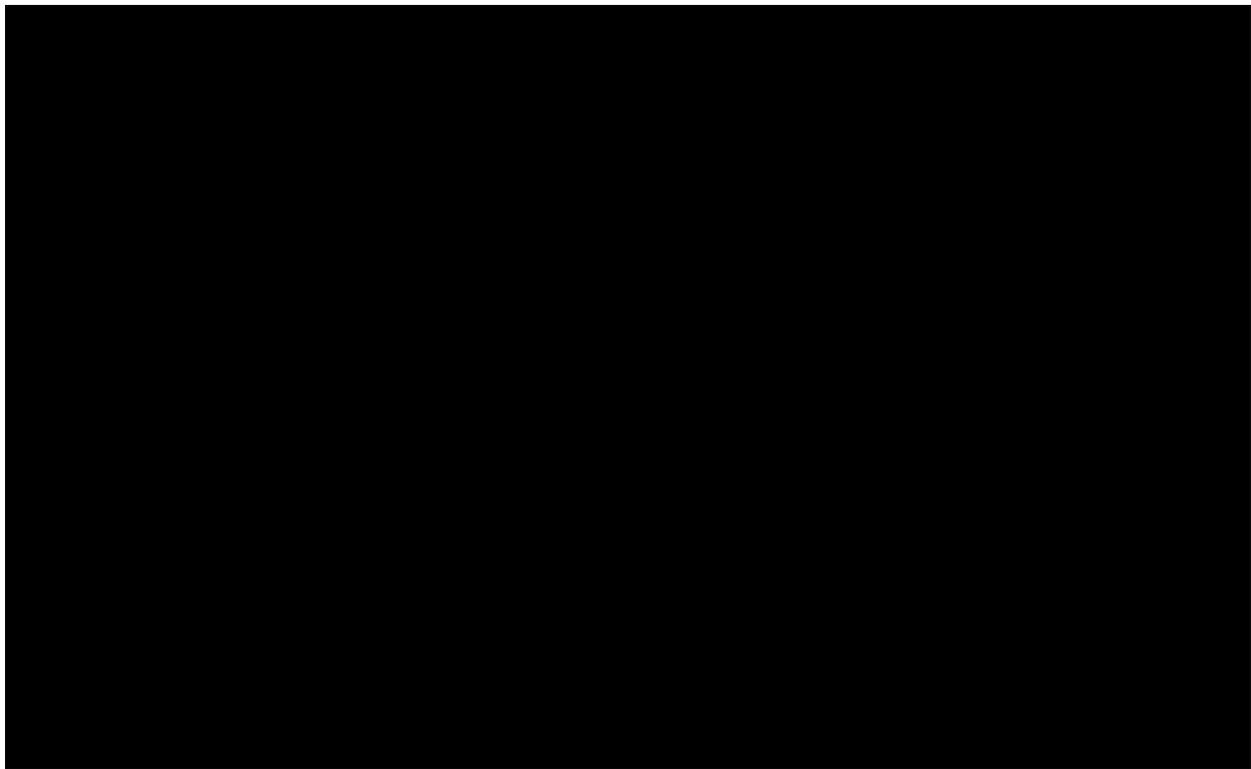
- Only the archived orders and their associated information are available.
- You can still search for and filter any of the orders in the database.
- You cannot edit or modify any orders in an archived database.
- You cannot create shipments for archived orders.
- You cannot download into an archived database.

The Process

Manually Archiving Orders

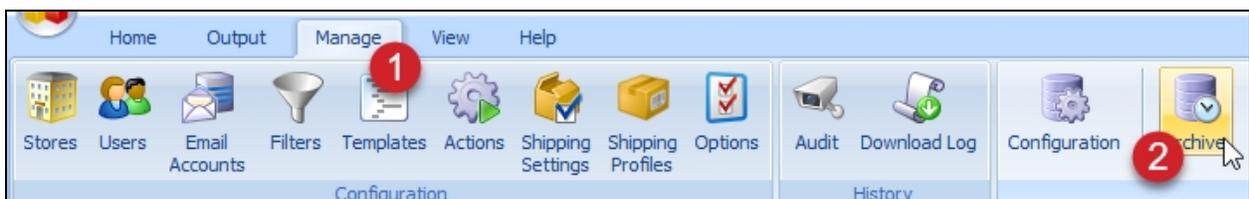
The following video clip will quickly guide you through the process of archiving orders in ShipWorks. More detailed steps can be found after the video.



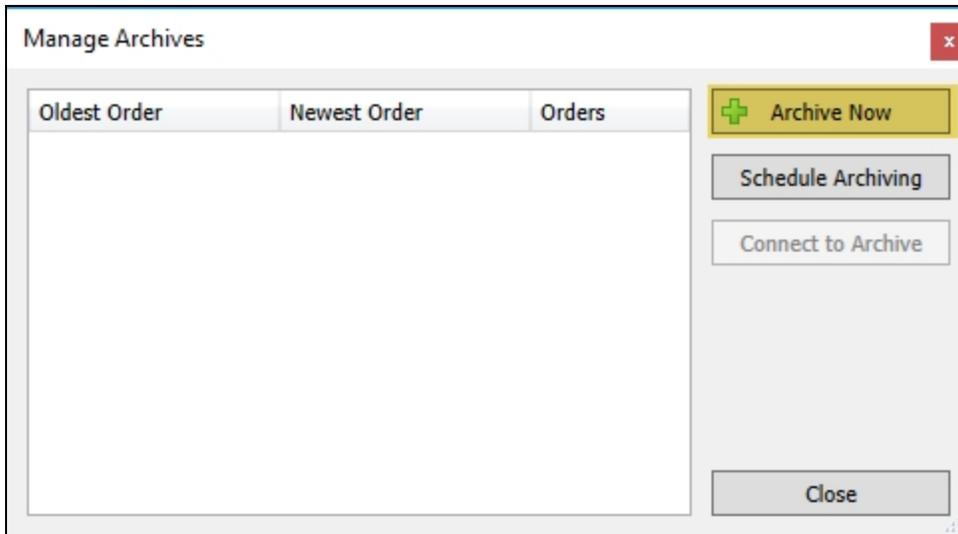


CLICK THE VIDEO TO VIEW FULL SIZE

1. Click on the **Manage** tab and then on the **Archive** button. The **Manage Archives** dialog opens.

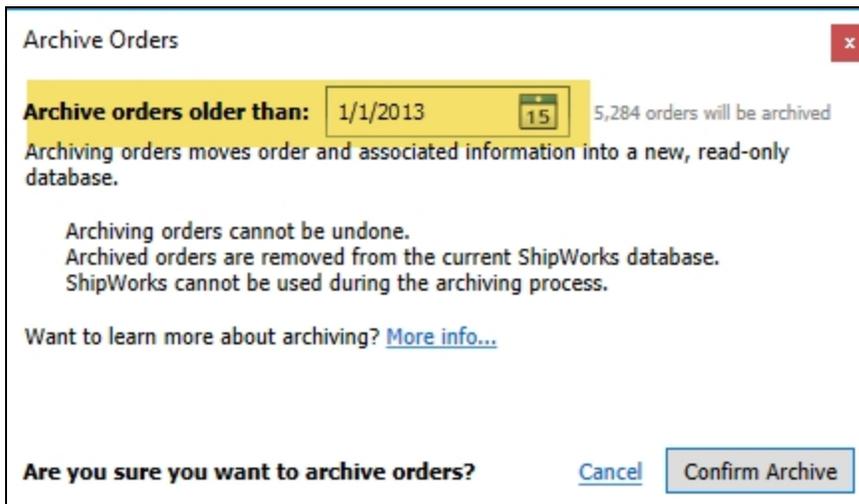


2. Click on the **Archive Now** button.



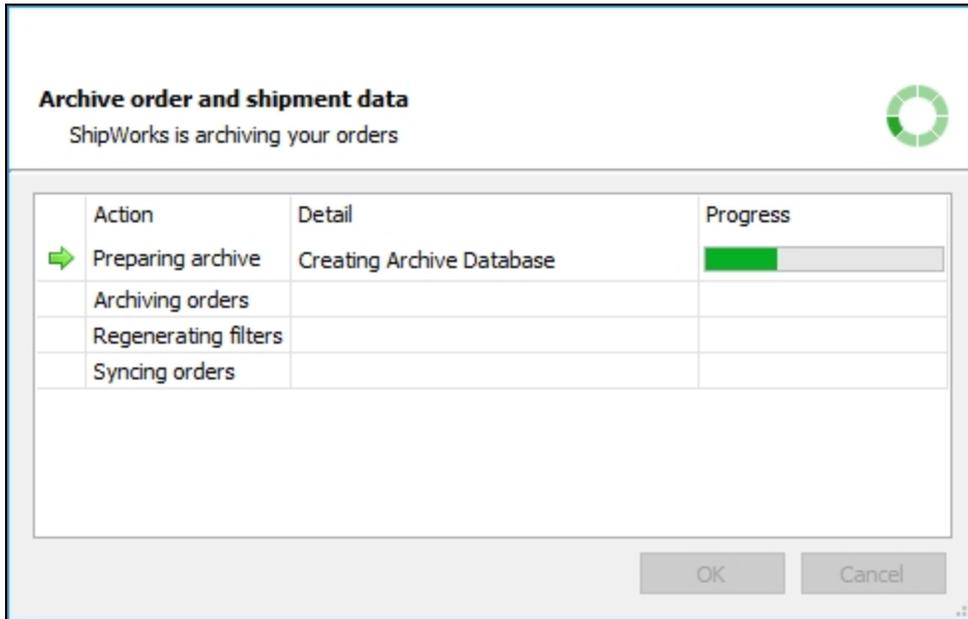
3. Enter the date prior to which you wish to archive orders. Orders with an order date older than the date entered will be archived and removed from the main ShipWorks database.

For example: In the screenshot, we entered 1/1/2014. So, orders with an order date of 12/31/2013 or older will be archived.

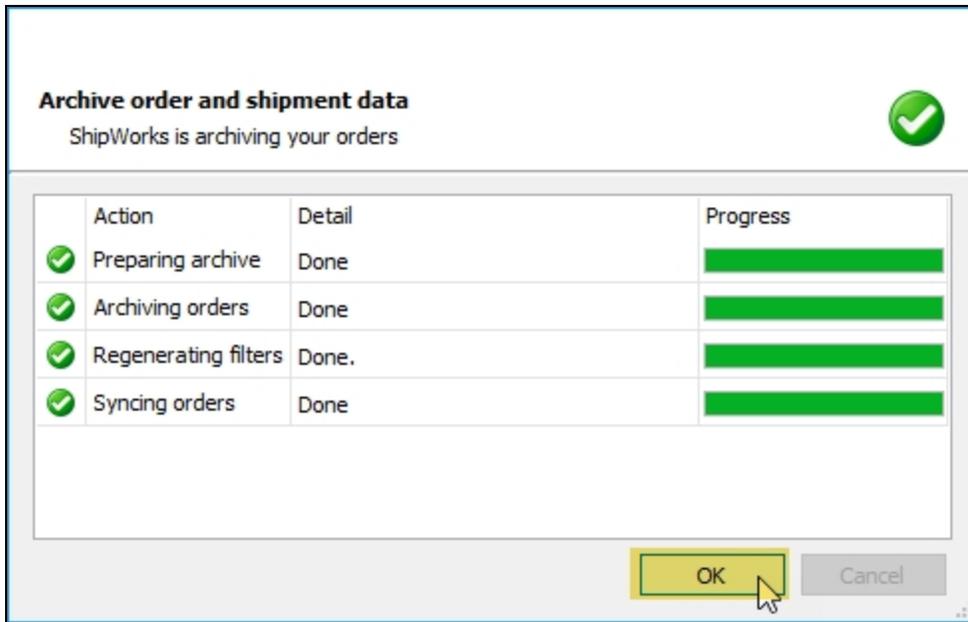


4. Click the **Confirm Archive** button to begin the archive process. As a reminder:

- Archiving orders cannot be undone.
- Archived orders are removed from the current ShipWorks database.
- ShipWorks cannot be used during the archiving process by any ShipWorks users.

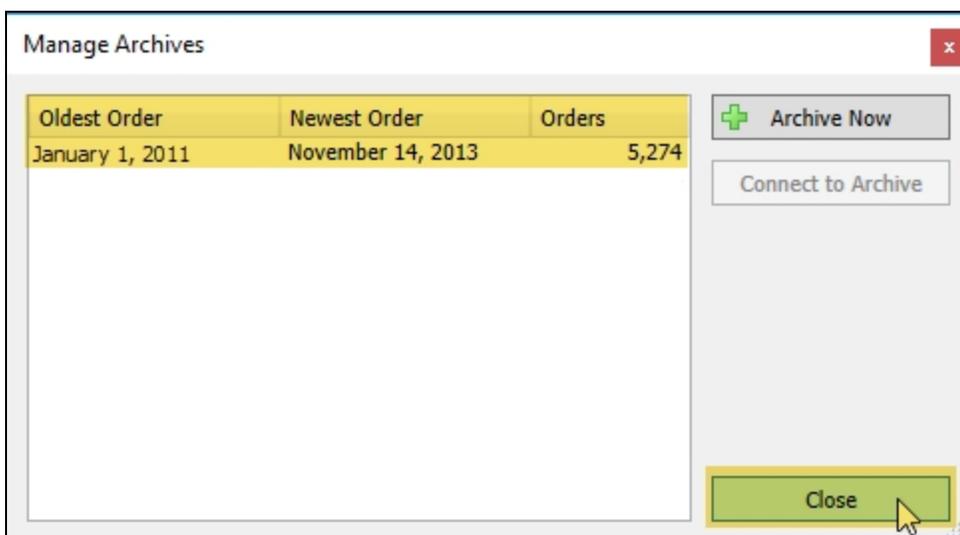


5. Once the archive process is complete, click the **OK** button.



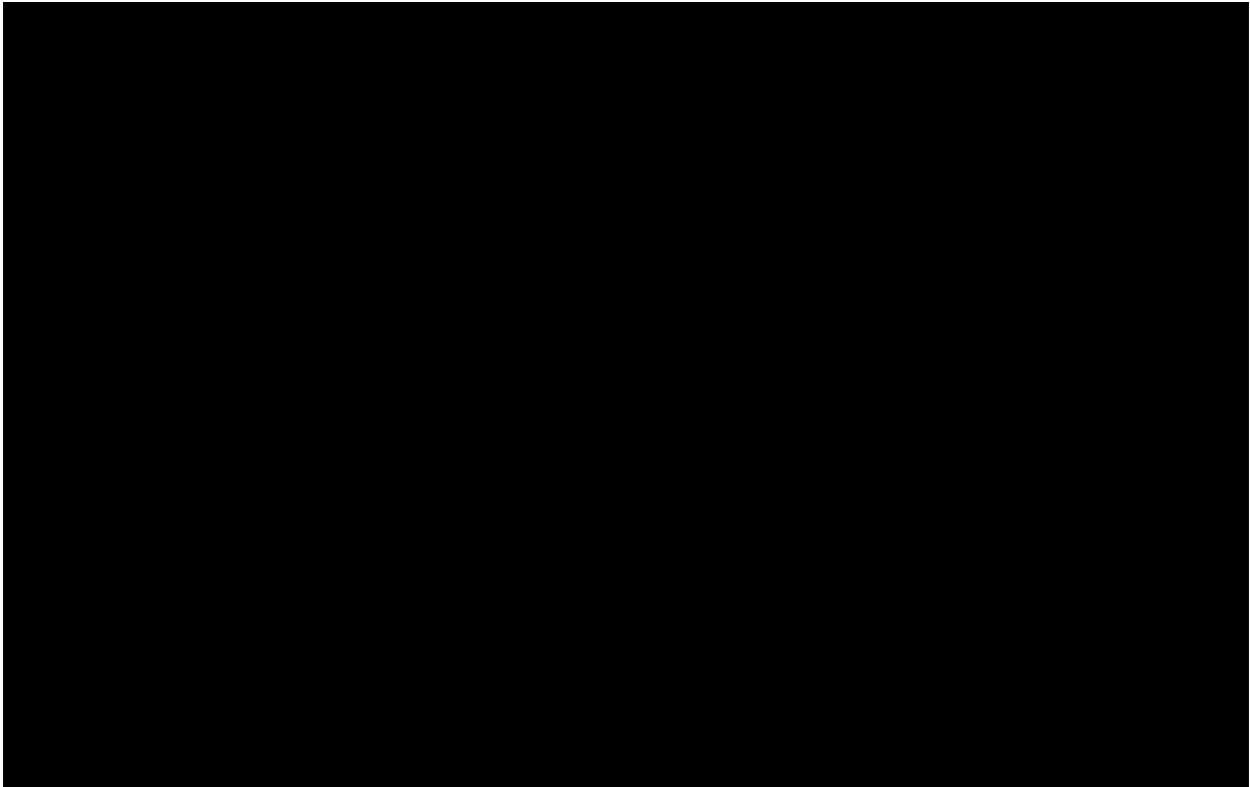
6. The archived database is now listed in the **Manage Archives** screen and gives you information on the oldest order, the newest order, and the number of orders in the archive.

Click **Close** to return to the main ShipWorks screen.



Archiving Automatically (Schedule Archiving)

You can also set up archiving so that your orders are automatically archived at a scheduled time and day. The following video clip will quickly guide you through the process of scheduling archiving of orders in ShipWorks. More detailed steps can be found after the video.

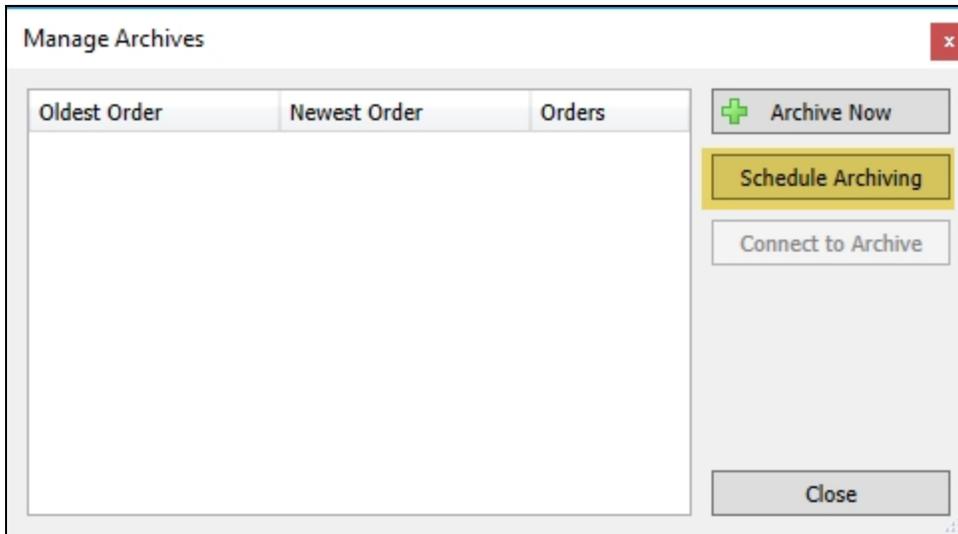


CLICK THE VIDEO TO VIEW FULL SIZE

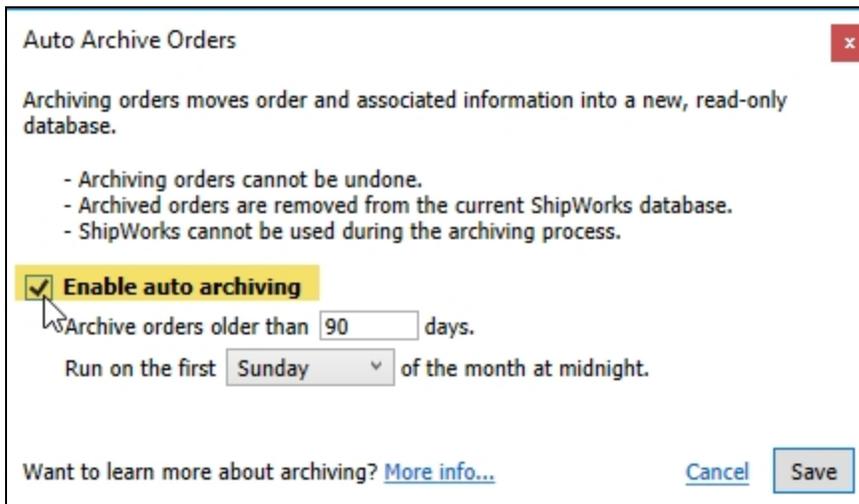
1. Click on the **Manage** tab and then on the **Archive** button. The **Manage Archives** dialog opens.



2. Click the **Schedule Archiving** button.

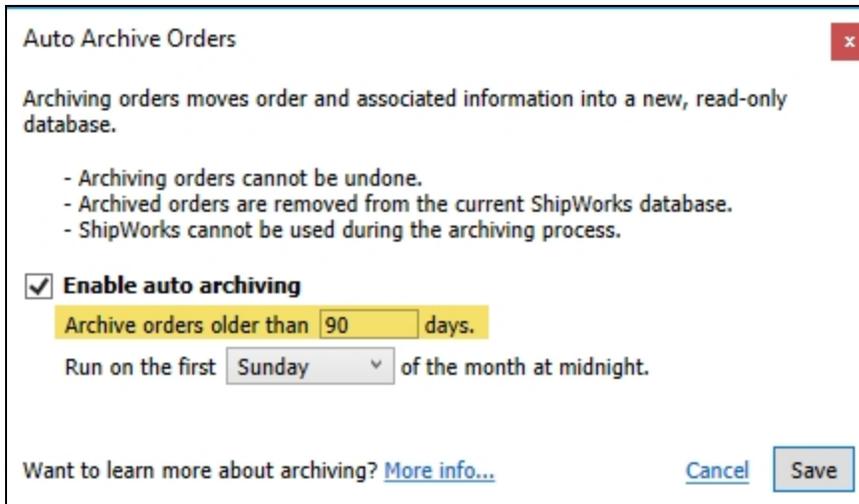


3. Check the box for **Enable auto archiving**.



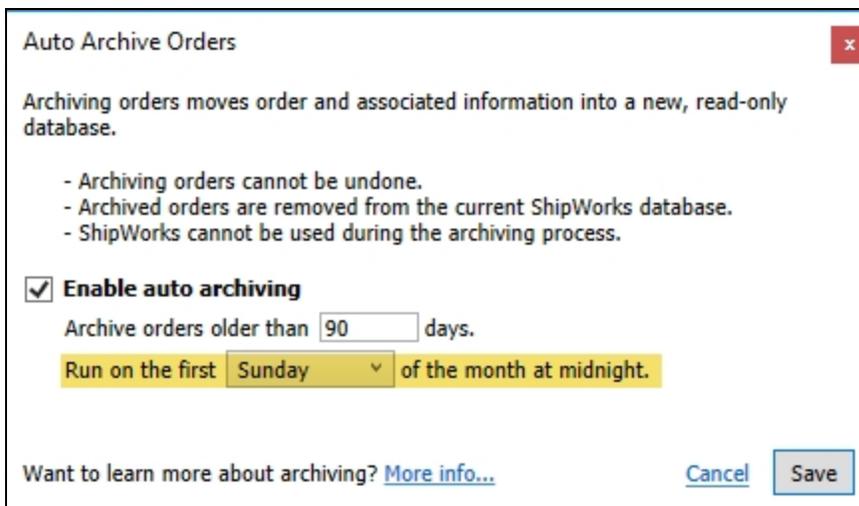
4. Set the number of days of orders you would like to keep in the active ShipWorks database.

- The default is 90 days. This means that each time the scheduled archive runs, orders older than 90 days will be archived. The result is that the active ShipWorks database will always have orders going back 90 days and all orders 91 days or older will be archived.



5. Select on which day of the week you would like the scheduled archive to run.

- The default is for the archive to run automatically at 12am on Sunday morning.



6. Once you have configured the archive schedule, click the **Save** button. Then click **Close**.

Related Articles

[Connecting to a ShipWorks Archive](#)

[Working in a ShipWorks Archive](#)

Still Need Help?

Please feel free to [reach out to one of our awesome Customer Care representatives in St. Louis.](#) We are happy to help.

