



# User's Guide

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## **ShipWorks Networking Guide**

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# ShipWorks Networking Guide

## Background

If your business uses multiple computers, you can maximize efficiency and productivity by using ShipWorks to connect each workstation.

A common shipping setup might include the following:

- Office computers (for running reports or printing invoices).
- Warehouse computers (for picking, packing, and so on).
- Additional computers for management (to oversee what is being done and assess workflow operations).

When these computers are connected with ShipWorks, order and shipping information is up-to-date across all workstations, with changes seen by each user (in real time). Every employee is informed with the necessary data on what needs to be shipped (or has already been shipped).

This guide will walk you through instructions in order to run ShipWorks on multiple computers (including basic troubleshooting). These instructions assume that ShipWorks has been installed on (at least) one computer and one store has already been set up.

## First Things First

If you want to run ShipWorks on more than one computer, we recommend performing these additional steps before getting connected:

- Back up your database. This way, you'll have your data in case anything less than- desirable happens. (It shouldn't.) If you are unsure of how to back up your database, [click here](#).
- Make sure that your computers are on the same network. (This means that they should be using the same internet connection to "talk" to each other.) If you're



unsure whether they're on the same network (or not), talk to your resident IT person.

- All of your computers should be running the same version of ShipWorks. [Check your version and upgrade to the latest version is needed.](#)

## Basic Terms

We'll be using terminology (that you might not be familiar with) throughout this guide. In order to proceed, here's some jargon (defined) to help you follow along:

**SQL Server:** This is the environment (outside the ShipWorks program) that ShipWorks uses to create and store a database. You shouldn't really notice this—just think of it as an additional program running in order to make your database accessible.

**SQL Instance:** A specific place where your ShipWorks information is stored.

**Database:** Your ShipWorks data ("residing" in a SQL Instance).

**Server Computer:** This is (likely) the first computer that you installed ShipWorks on. This computer is the one where SQL Server is installed and (hopefully) running. To find out which computer is your server computer, see pages 8-10.

**Client Computer:** These are the other computers you want to connect to ShipWorks. They use your internet connection to access your server computer's (ShipWorks) database, and they will not have SQL running on them.



## 01: Preparing to Connect

The instructions in this section (below) will prepare your server computer to allow other computers (on your network) to connect to it.

This includes:

- Checking to see if remote connections are enabled.
- Locating your ShipWorks database.
- Enabling remote connections on your server computer. (This is just a fancy way of saying “allowing other computers to connect to your computer”.)
- Locating your server computer (if you are already somehow set up to allow remote connections).

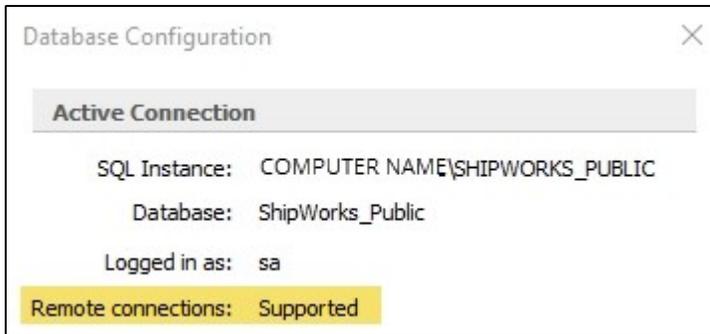
## Are Remote Connections Enabled?

Before you can connect additional **client computers** to the ShipWorks database, you will need to determine if remote connections are enabled on your ShipWorks **database**. Here's how:

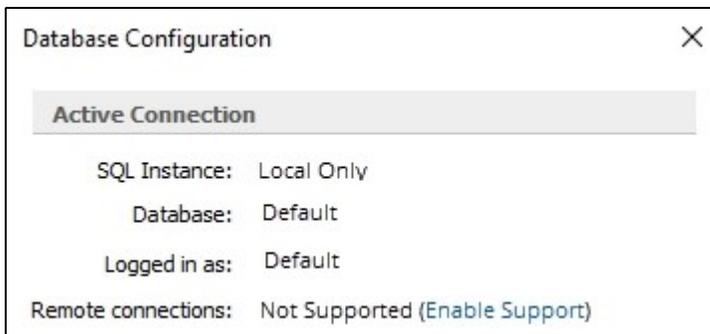
1. In ShipWorks, click on the **Manage** tab and then on the **Configuration** button.



2. On the **Database Configuration** screen, locate the line **Remote Connections**:
  - Does it say **Supported**? Great! You are all set. Move on to the [Locating Your Database](#) section.



- Does it say **Not Supported (Enable Support)**? You will need to enable remote connections. Continue on to the [Enabling Remote Connections](#) section.



## Enabling Remote Connections

Remote connections allow other computers on your network to connect to and to use a single ShipWorks database. On the **Database Configuration** screen, if your **SQL Instance:** shows **Local Only** you will need to follow these instructions to prepare your computer to allow connections.

Perform the following instructions on the computer that the ShipWorks database resides. This is more than likely the first computer that you installed ShipWorks on. It is probably the computer that you just checked to see if remote connections are enabled in the steps above. Performing the instructions below will convert your **Local Only** database into a server and will allow additional ShipWorks computers to connect to the ShipWorks database.



Before continuing, this may be a good time to check to [see if the computer running the ShipWorks database meets the system requirements](#) to run ShipWorks.

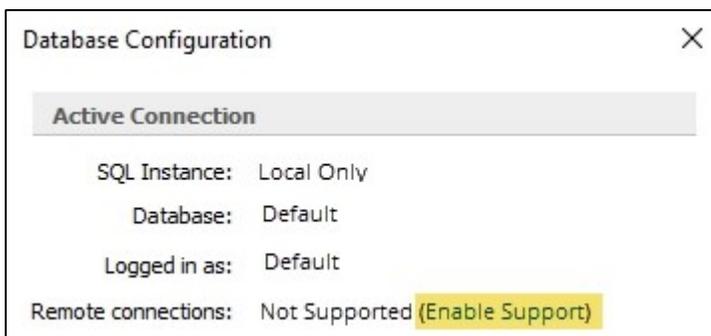
## The Process

Enabling remote connections may take several minutes to complete. During this time, you will not be able to use the ShipWorks software. We recommend performing these steps during a time when you are not shipping.

1. Click on the **Manage** tab and then on the **Configuration** button.

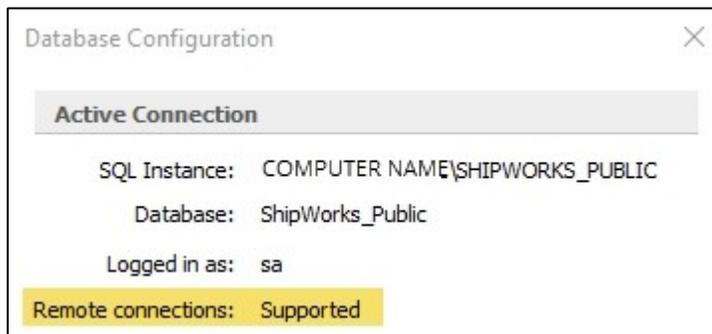


2. On the **Database Configuration** screen, click the **Enable Support** link.



3. A window will pop up letting you know that ShipWorks is ready to be enabled for remote connections. Click **Next**.
4. If prompted, authorize ShipWorks to make changes to your computer by clicking **Yes**. ShipWorks will begin enabling remote connections. This is the step that can take several minutes to complete.

5. If prompted and if you are ready (and have saved any work you were doing outside of ShipWorks), click **Restart my computer now**. Otherwise, select **I will restart my computer later** (ShipWorks will update when you restart your computer next time).
6. Once you restart your computer (and run ShipWorks), click **Next**. (If necessary, authorize ShipWorks to make changes.)
7. Click **Finish** to complete the setup.
8. If you navigate back to **Manage > Configuration**, you should see that **Remote Connections:** are now supported.

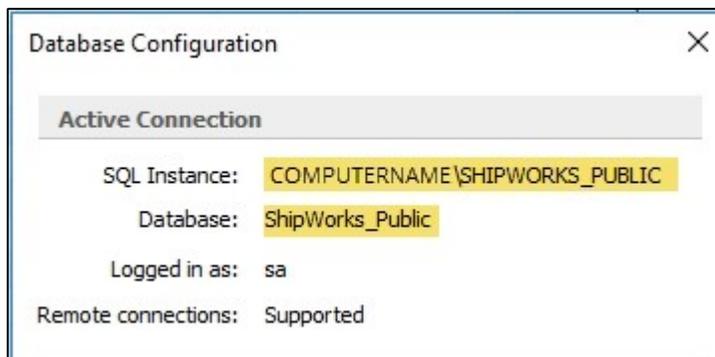


The database is now ready to have additional ShipWorks computers connect to it.

## Locating Your Database

Before you can connect additional computers to ShipWorks, you will need to locate where your database resides so that you can point any additional ShipWorks client computers to the ShipWorks database.

1. Click on the **Manage** tab and then on the **Configuration** button.
2. On the Database Configuration screen make note of the following: (It might be a good idea to write the information down.)
  - **SQL Instance:** This is the path to the ShipWorks database. It consists of the name of the computer followed by the name of the database instance, like: **computername\instancename**
  - **Database:** This is the name of the ShipWorks database.



## 02: Connecting Client Computers

To successfully perform the tasks in the next section, you should have the following information handy:

- Knowing which computer is your server computer. ([Click here](#) if you are unsure which computer is your ShipWorks server.)
- Your **SQL Instance** (see the [Locating Your Database](#) section)
- Your **SQL Database**. (see the [Locating Your Database](#) section)

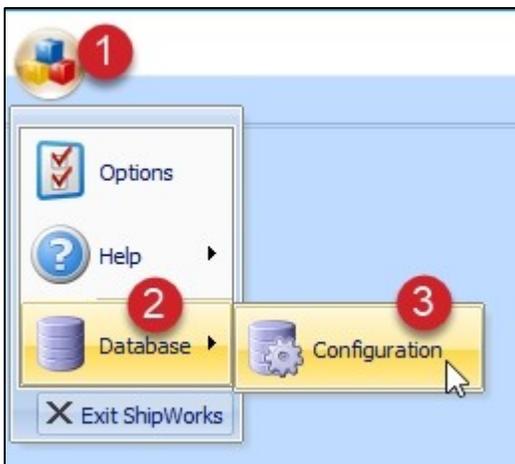
Unless specified, the following instructions need to be performed on a client computer in order to connect with your server computer.

## When You Have Just Installed the ShipWorks Software

1. On the **Welcome to ShipWorks** screen, click in the **Get set up** button located under **Do you already use ShipWorks?**



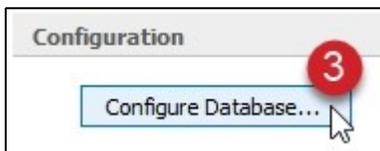
If the **Welcome to ShipWorks** screen is not displayed and you have just a big, blank, blue screen, click on the **Application menu** located at the top left corner of ShipWorks. Then, click on **Database > Configuration**.



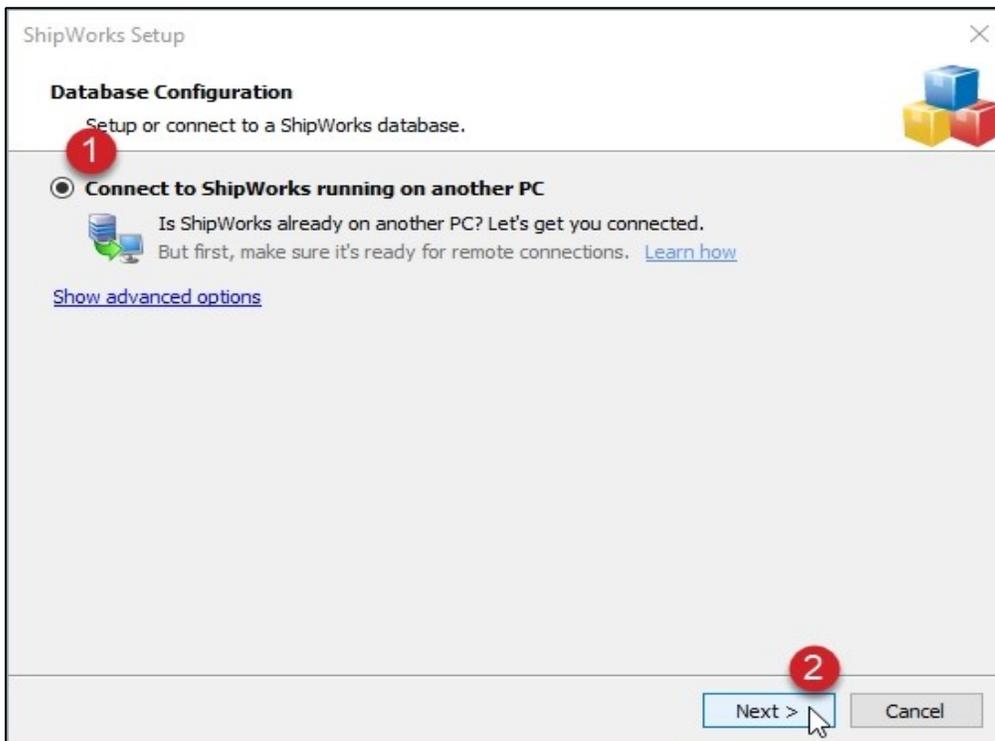
[Continue to Step 2 below.](#)

## On a Computer Already Running ShipWorks

1. Click on the **Manage** tab and then on the **Configuration** button. Then, click on the **Configure Database...** button.



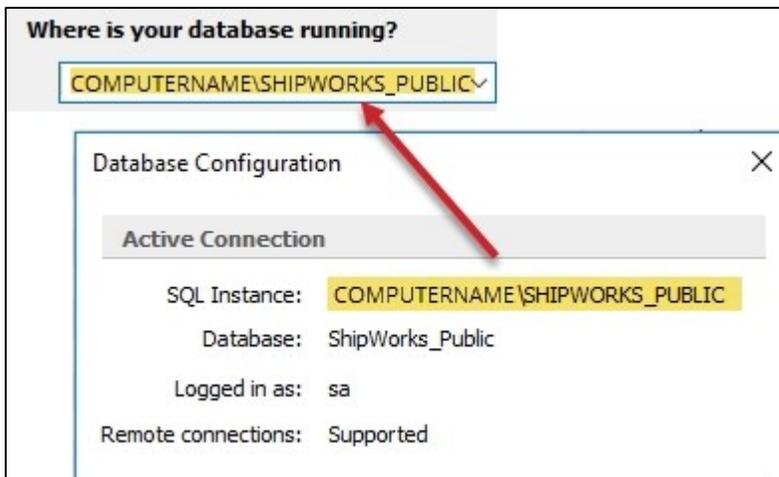
2. Verify that **Connect to ShipWorks running on another PC** is selected and click **Next**.



3. ShipWorks does its best to detect any instances of ShipWorks running on your computer network and will display them in the **Where is your database running?** drop-down menu. Click on the drop-down menu and select the database instance for your ShipWorks server. (You wrote the instance down when following the steps in the [Locating Your Database](#) section of this article.)

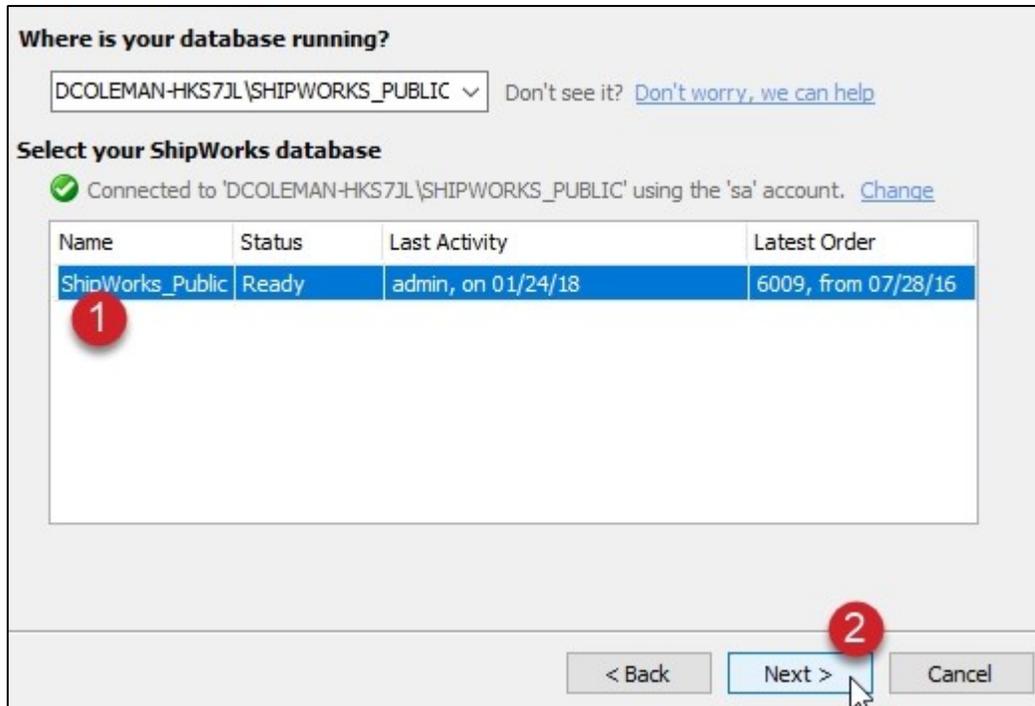


**Note:** If you do not see the instance in the drop-down menu you can type the instance name into the field manually.



4. Once you have selected the correct SQL Instance, the **Select Your ShipWorks Database** field will display the available database(s). Select the correct database and then click **Next**. (You wrote the Database down when following the steps in the [Locating Your Database](#) section of this article.)





5. You are now connected to the ShipWorks database. Click **Finish**.

## I'm Having Issues Getting Connected

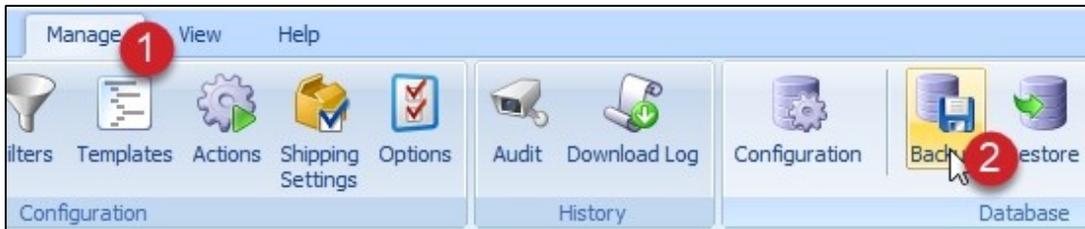
[Please see the troubleshooting section](#) located at the end of this User's Guide.

## 03: Switching Server Computers / Moving the ShipWorks Database

There may be a time when you need to change the ShipWorks server computer. Perhaps you upgraded to a new computer. The good news is that it is easy to backup your entire ShipWorks database and to restore it onto the new computer.

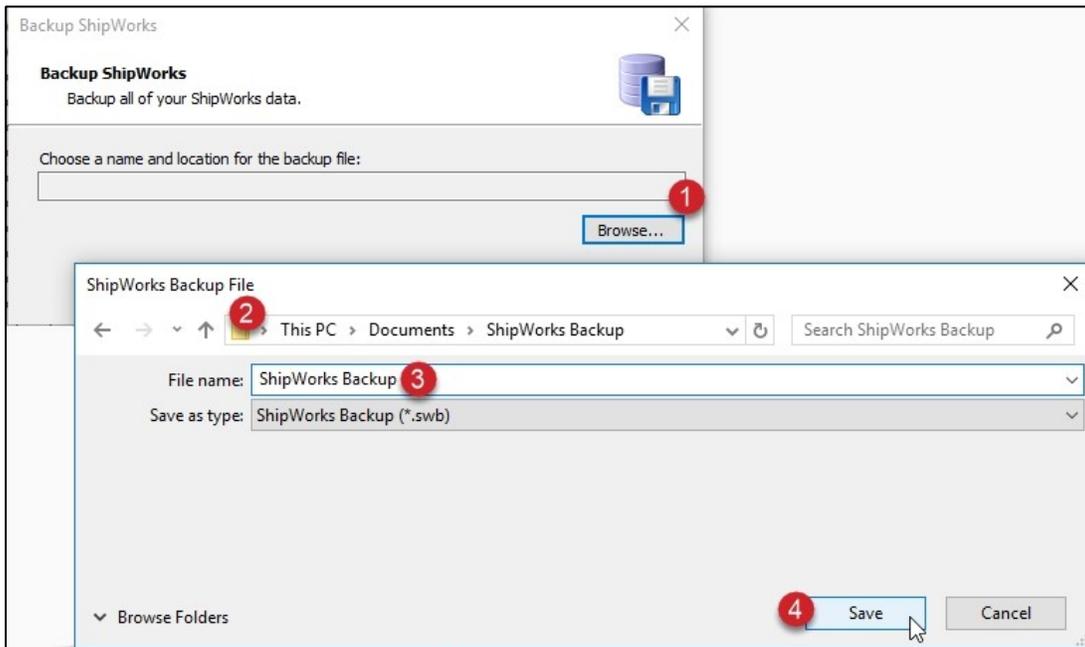
## Backing up Your ShipWorks Database

1. Launch the ShipWorks application on the current ShipWorks server. (If you are not sure which computer is the server, [please see the troubleshooting section](#) of the User's Guide.)
2. In ShipWorks, go to the **Manage** tab and then click on the **Backup** button.

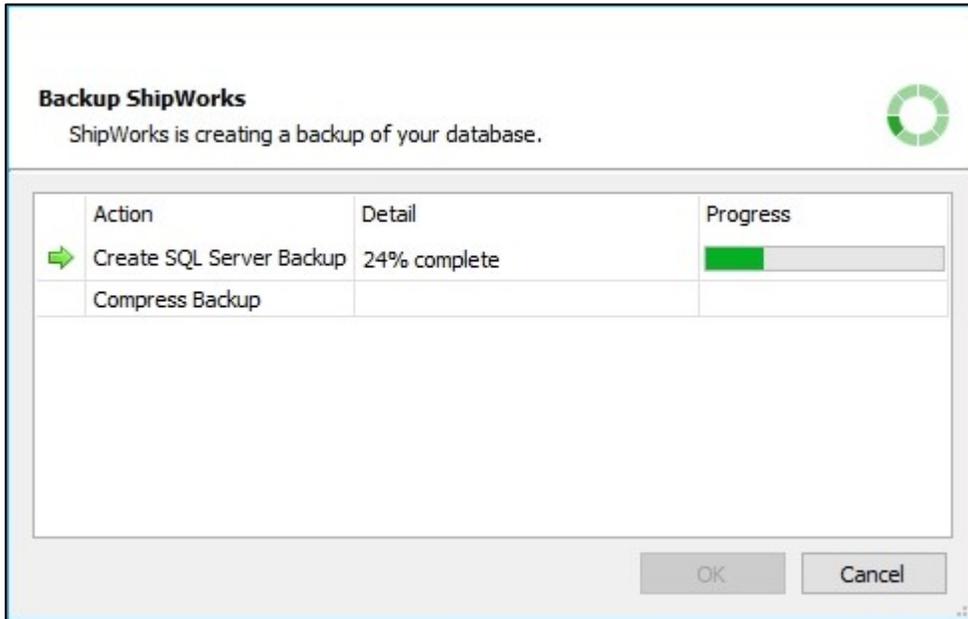
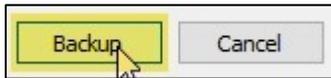


3. Click the **Browse...** button. Then, navigate to where you would like to save the backup file, give the file a name, and click the **Save** button.

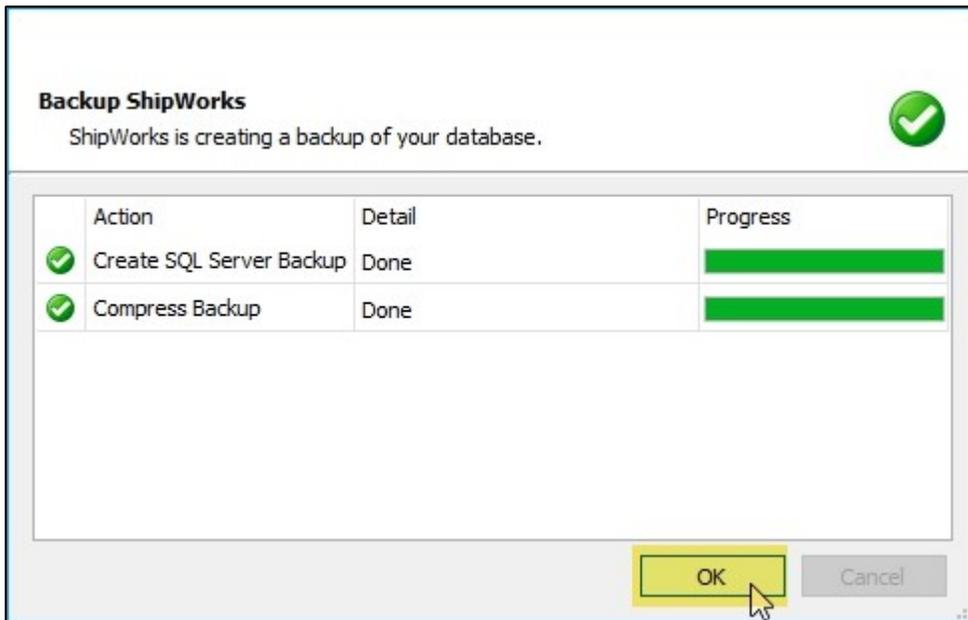
You may wish to save the backup to a network folder or to removable media such as a thumb drive. You will need to have access to the ShipWorks backup file when restoring the database onto the new ShipWorks server computer.



4. Click the **Backup** button to begin the backup process.



5. Once the backup is complete, click the **OK** button.

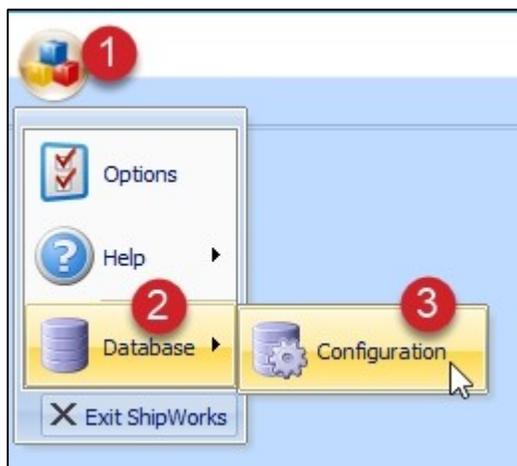


## Restoring the ShipWorks Database onto the New Server Computer

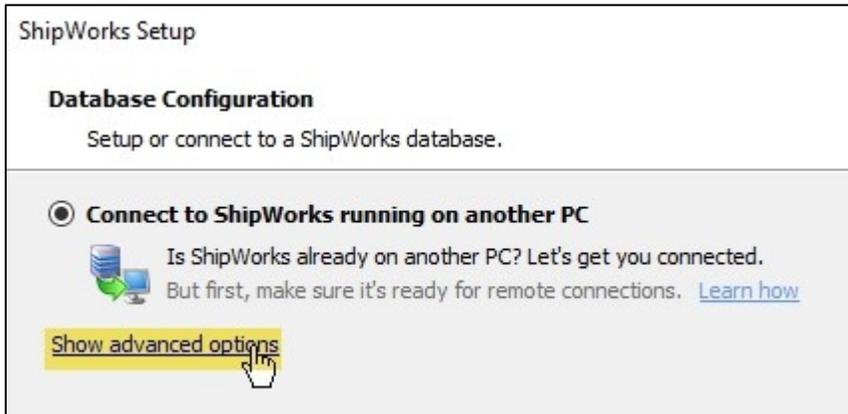
1. [Install ShipWorks](#) onto the new server computer.
2. When prompted with the **Welcome to ShipWorks** screen, click the **Get set up** button.



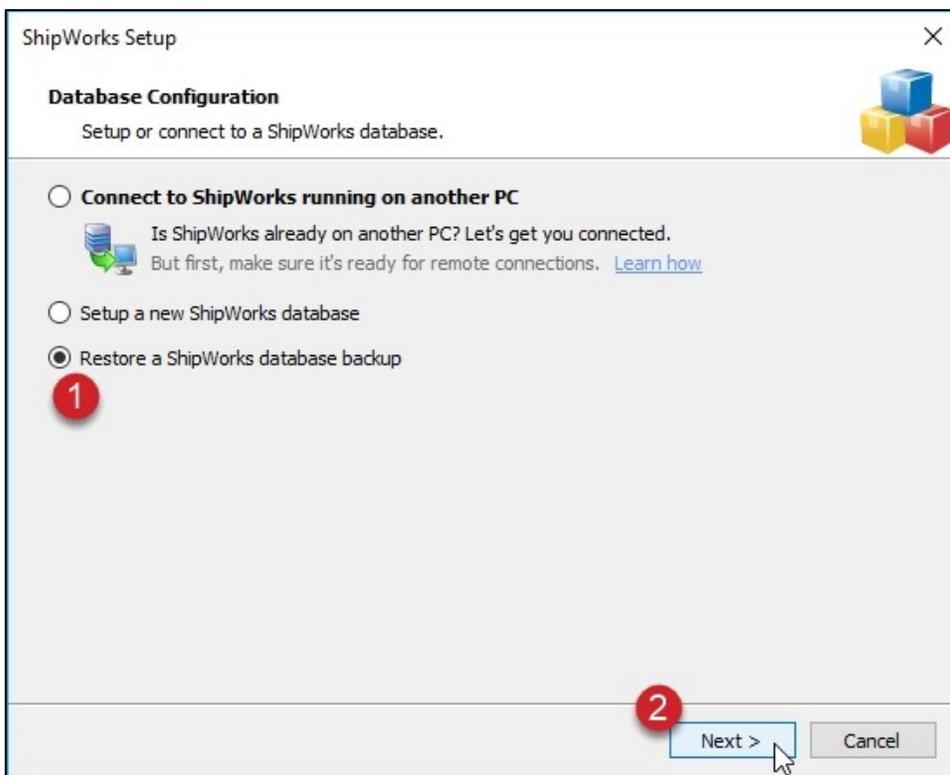
If the **Welcome to ShipWorks** screen is not displayed and you have just a big, blank, blue screen, click on the **Application menu** located at the top left corner of ShipWorks. Then, click on **Database > Configuration**.



3. Click on the blue text **Show advanced options**.



4. Select **Restore a ShipWorks database backup**. Then, click **Next**.



5. If you are prompted with the **Restore Location** screen:
- If you have not yet configured a ShipWorks database, select **Restore into a new database**. This is the most common selection when moving ShipWorks to a new server computer.

**Restore Location**

Choose where the database will be restored to.

**Restore over the current database**  
All of the data in the current database will be overwritten.

**Restore into a new database**  
Select this option to create a new ShipWorks database to load the backup into.

- If, however, you or your local IT person has already created a new ShipWorks database, select the option to **Restore over the current database**.

**Restore Location**

Choose where the database will be restored to.

**Restore over the current database**  
All of the data in the current database will be overwritten.

**Restore into a new database**  
Select this option to create a new ShipWorks database to load the backup into.

Click **Next**.

6. If the computer you are configuring as the new ShipWorks server already has SQL installed you will be presented with options to:
- Use the currently installed instance of SQL Server
  - Choose a different instance of SQL
  - or to **Install a new Instance of Microsoft SQL Server**



Typically, when installing ShipWorks onto a new server computer you will install a new instance of SQL Server. This is the default setting if SQL is not already installed on the computer.

The default Instance Name is **ShipWorks**. If you'd like to change it you can, but we recommend leaving the name as ShipWorks.

**For your new ShipWorks database:**

Use the current instance of Microsoft SQL Server

Choose a different instance of Microsoft SQL Server (You'll choose in the next step)

Install a new instance of Microsoft SQL Server

New instance name:  [i](#)

Click **Next**.

7. Click **Next** again to install the ShipWorks SQL Instance. This step can take a few minutes.
8. Once the instance is installed you will be prompted that the name of your new database will be **ShipWorks**. If you wish to change the name, click the **Edit** link and enter the name of the database. Otherwise, just click **Next**.

ShipWorks Setup

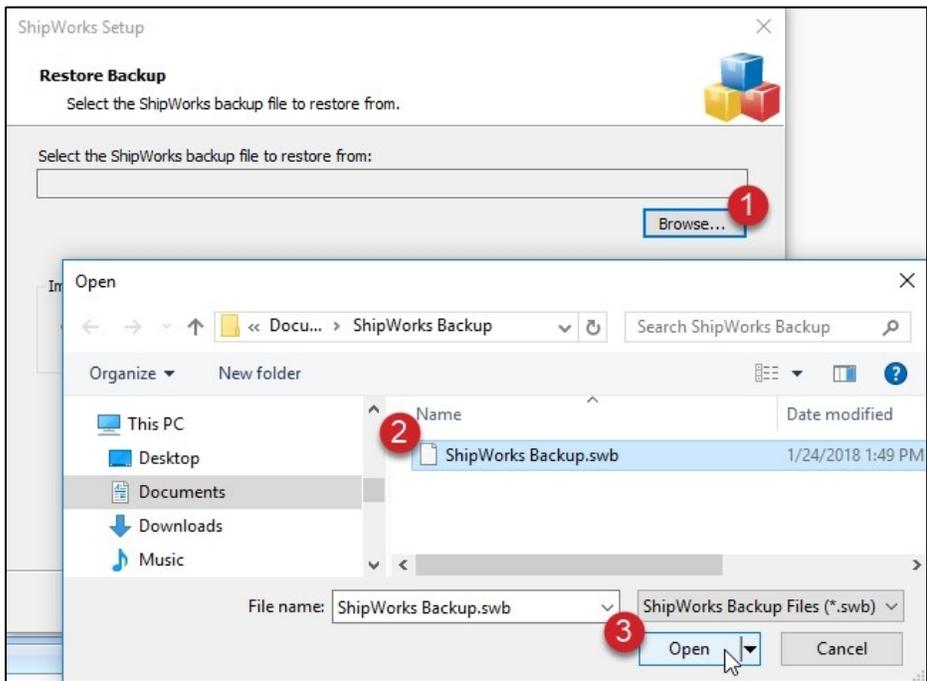
**Database Name**  
Confirm the name of the ShipWorks database.

Your new database name will be: **ShipWorks** [\(Edit\)](#)

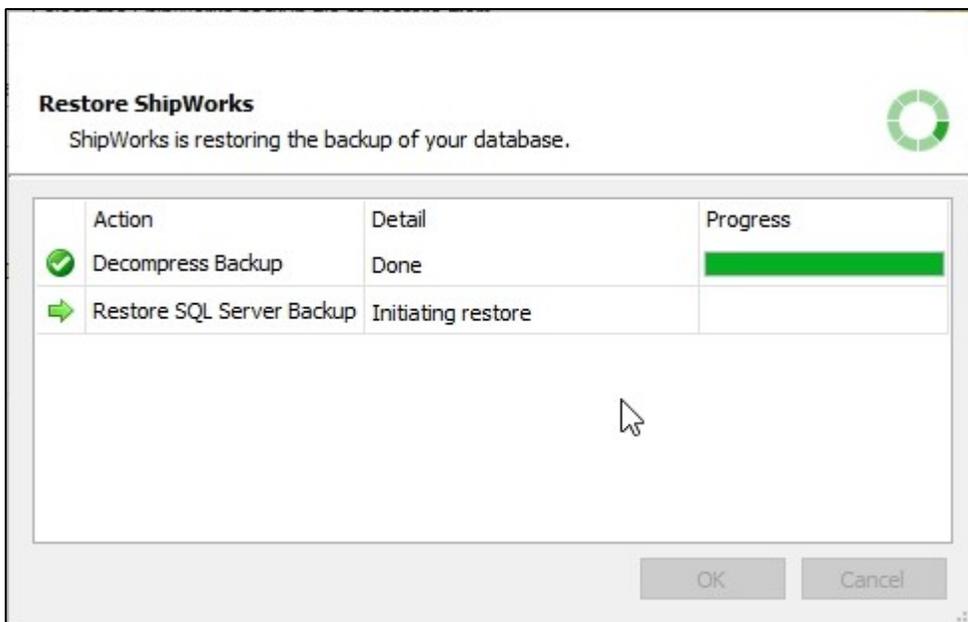
< Back   Next >   Cancel



9. When the **Restore Backup** screen displays, click on the **Browse...** button and navigate to the ShipWorks backup file you created in the previous section of this guide. Click **Open**.



10. Click **Next** to launch the restore process.



11. Once the file is successfully restored, click **OK**. Then, click **Finish**.

After restoring the database, you will need to connect any ShipWorks client computers to the new server computer. Please see [Chapter 1](#) and [Chapter 2](#) for assistance with connecting your client computers.

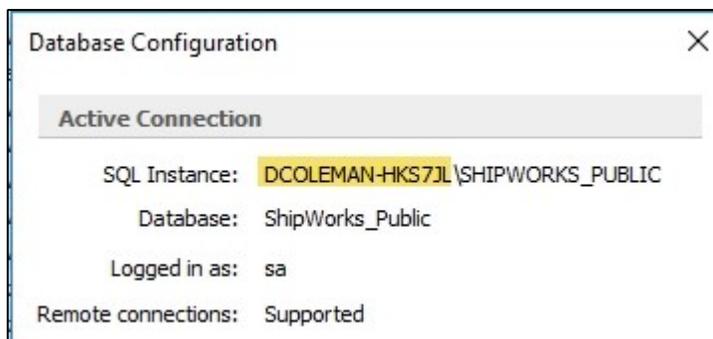
## 04: Troubleshooting and Advanced Configuration

### I'm not sure which computer is the ShipWorks server.

#### Locating the ShipWorks Server Computer Name

So, the **Database Configuration** screen shows a SQL instance, but you're not sure which computer the ShipWorks server is on? The good news is that it is pretty easy to figure it out.

1. In ShipWorks, open the **Database Configuration** screen by clicking on the **Manage** tab and then the **Configuration** button.
2. Take a look at the **SQL Instance:** line. The first part of the instance name (the part prior to the back-slash) is your Shipworks server computer name. Make note of your server computer name.



## Checking the Name of Your Computers

1. Now, let's check the name of the computer you are on. To do so:

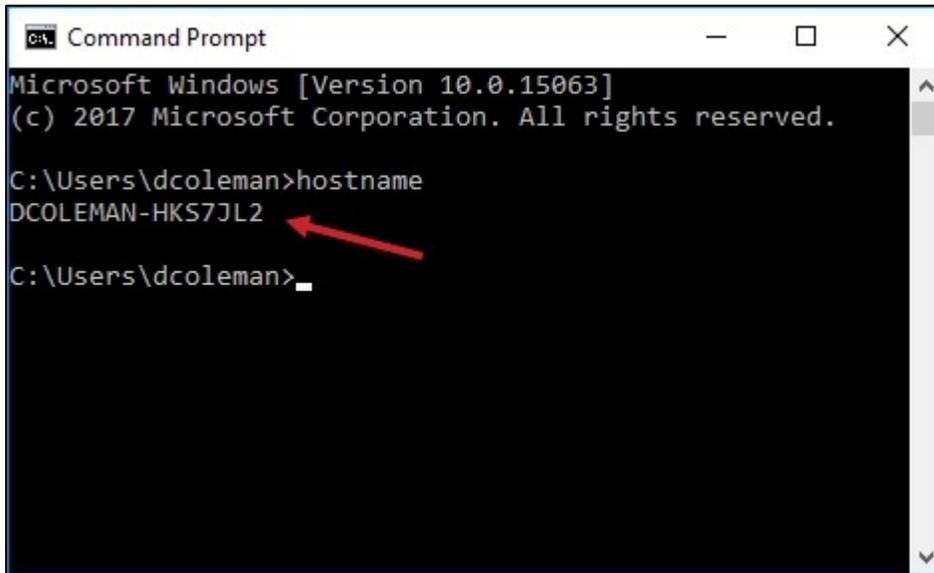
- Windows 7
  - Click on the **Windows Start** button. In the Search box, type **CMD** and press **Enter**.



- Windows 10
  - Type **CMD** into the **Type here to search** bar and press **Enter**.

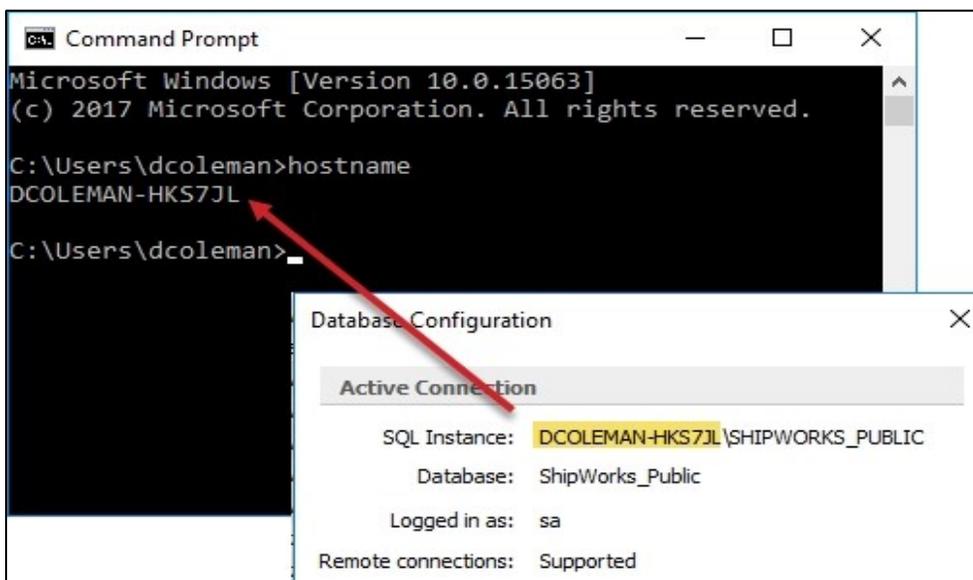


2. A Command Prompt will open. At the prompt, type **HOSTNAME** and press **Enter**. This will display the name of the computer that you are currently on.



Does the computer name displayed match the computer name in the SQL Instance?

- **Yes.** Great you have located the ShipWorks server computer.
- **No.** Repeat the above steps on each computer until you find the computer with a name that matches the computer name in the SQL Instance.



## Using an IP Port Number to Connect Clients

If you're having trouble connecting clients to your server computer using the regular connection method try to connect using the SQL Server port number (a direct connection point that bypasses other programs that might prevent your connection).

### Locating the IP Port Number

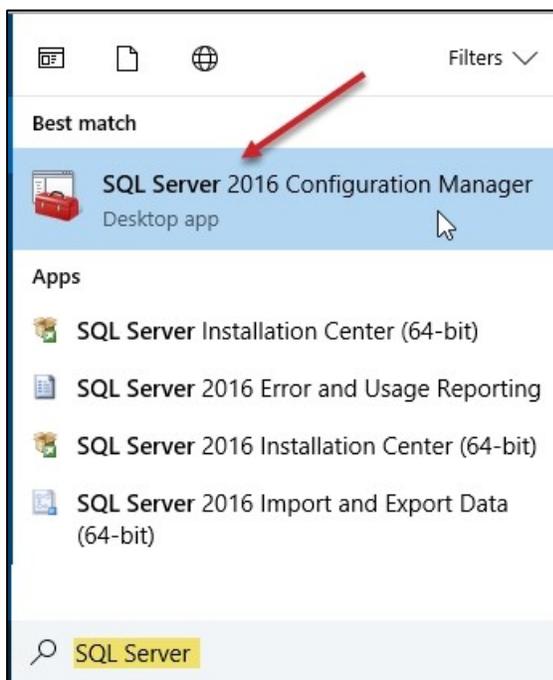
1. Launch SQL Server Configuration Manager.

#### Windows 7

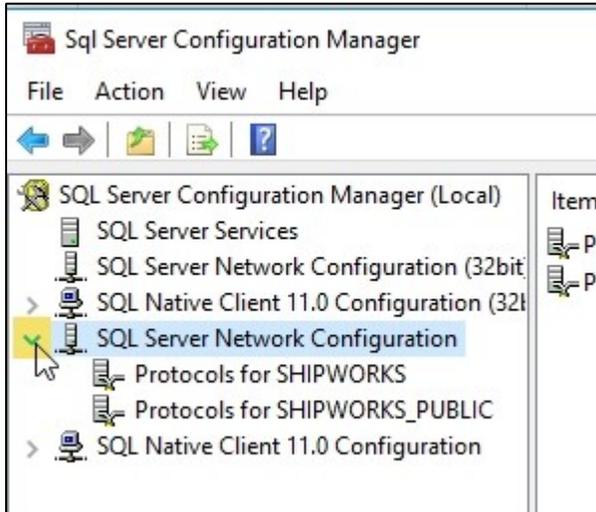
- Click the **Windows Start** button.
- Go to **All Programs > Microsoft SQL Server**
- Click on **SQL Server Configuration Manager**

#### Windows 10

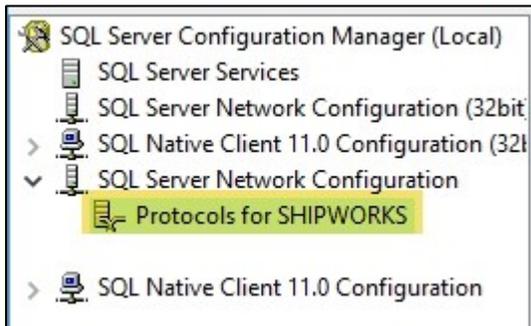
- In the **Type here to search** field, type **SQL Server**
- Locate **SQL Server Configuration Manager** in the list of search results. Click it to open.



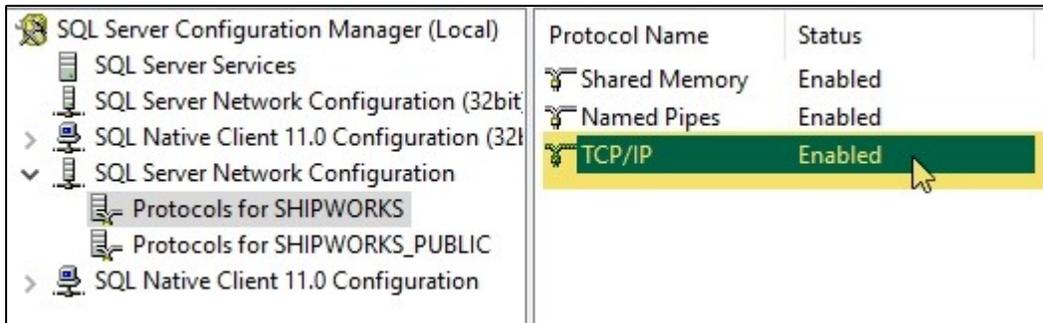
2. Expand **SQL Server Network Configuration** on the left side of the SQL Server Configuration Manager.



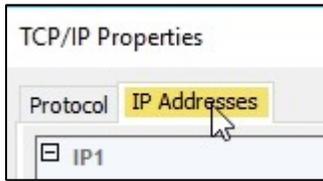
3. Select **Protocols for ShipWorks**.



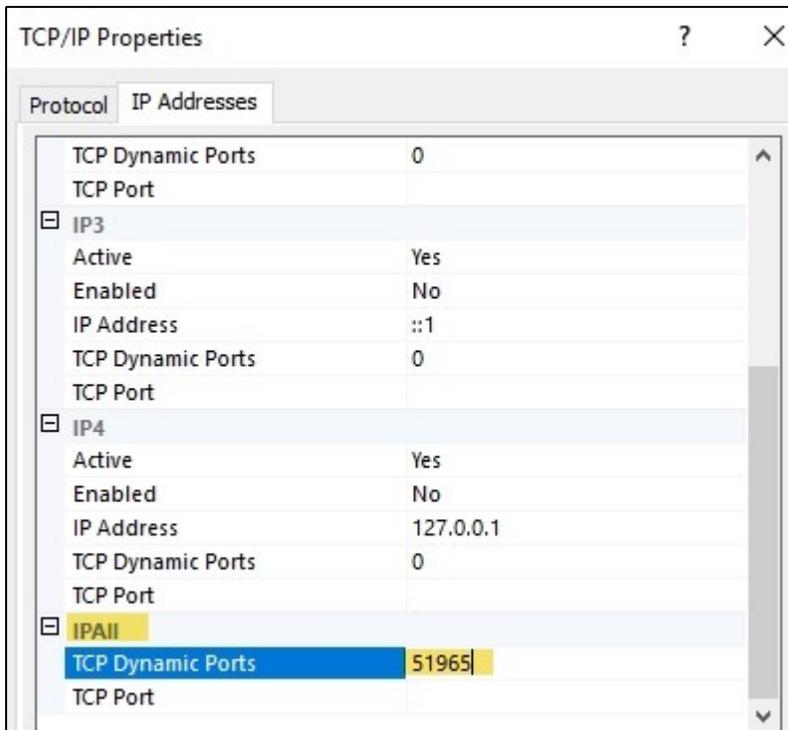
4. Double-click on **TCP/IP** under Protocol Name.



5. Select the **IP Addresses** tab.



6. Scroll down and locate the section labeled **IPAll**. Make note of the port number listed to the right of **TCP Dynamic Ports**. You will need this port number in the following steps.



## Using the Port Number When Connecting Clients

1. Follow the steps in [Chapter 2](#) of this article. In step 3, when selecting the SQL Instance add **,PORT NUMBER** to the end of the instance name.

For example: If the instance name is **COMPUTERNAME\INSTANCE** and your port number is **51965**, you would enter it as **COMPUTERNAME\INSTANCE,51965**.

**Where is your database running?**

MAN-HKS7JL\SHIPWORKS\_PUBLIC,51965

2. Click Enter once you have entered the port number. Then, follow the remaining steps in [Chapter 2](#).

## I've Entered the SQL Instance Correctly, but My Database(s) Aren't Showing

Sometimes Windows will default to Windows authentication when trying to connect to your ShipWorks database. You can modify this to use SQL Server Authentication instead. Try this:

1. Follow the steps in [Chapter 2](#) until you reach step 4.
2. Click the blue **Try Changing the Account** link under **Select your ShipWorks database** on the **Connect to ShipWorks** screen.

ShipWorks Setup

**Connect to ShipWorks**  
Choose a running database to connect to.

**Where is your database running?**

DCOLEMAN-HKS7JL\SHIPWORKS Don't see it? [Don't worry, we can help](#)

**Select your ShipWorks database**

⚠ Could not connect to 'DCOLEMAN-HKS7JL\SHIPWORKS' [Try changing the account](#)

3. Select **SQL Server Authentication**. Then, enter the SQL **Username:** and **Password:**.

**Hint:** ShipWorks creates a default username and password when it is installed.

**Username:** sa

**Password:** ShipW@rks1



If you believe that you or your IT person may have created a unique username or password, be sure to enter these instead of the defaults listed above.

4. Click **OK**. If successful, the ShipWorks database will be listed for you and you can continue with step 4 of Chapter 2.



SQL Server Account

**Log on to SQL Server using:**

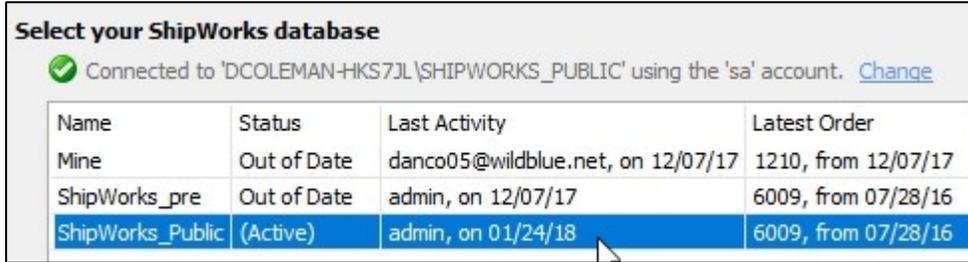
SQL Server authentication

Username: sa

Password: ●●●●●●●●

Windows authentication  
You must be currently logged in to Windows as a user that has access to SQL Server.

OK Cancel



Select your ShipWorks database

✓ Connected to 'DCOLEMAN-HKS7JL\SHIPWORKS\_PUBLIC' using the 'sa' account. [Change](#)

Name	Status	Last Activity	Latest Order
Mine	Out of Date	danco05@wildblue.net, on 12/07/17	1210, from 12/07/17
ShipWorks_pre	Out of Date	admin, on 12/07/17	6009, from 07/28/16
ShipWorks_Public	(Active)	admin, on 01/24/18	6009, from 07/28/16



## Manual Installation of SQL Server 2017 Express

Microsoft SQL Server 2017 Express is the free version of Microsoft SQL Server 2017. It contains 10 GB of storage space and is the default version of SQL Server automatically installed by ShipWorks.

If you need more than 10GB of database storage space you will need to purchase a full, licensed copy of SQL Server from Microsoft. Please contact Microsoft directly about which paid SQL Server option would work best for your business.

### Installing SQL 2017 Express

If you need to install SQL 2017 Express manually, we have a help article to guide you through the steps. [Click here to open the Manual Installation of SQL 2017 Express help article.](#)

### Connecting ShipWorks to Your New Database

Now that you have installed and set up your SQL 2017 Express database, you will need to connect ShipWorks to it. [Click here](#) and you will be taken to the section of this User's Guide which will guide you through the process.

## I Need to Allow SQL Through the Windows Firewall

Firewalls are designed for security purposes, keeping unwanted programs (like viruses) from accessing your information. However, sometimes it's so good at doing its job that it prevents ShipWorks from connecting to your server computer. Perform the following actions on all computers that you want to connect via ShipWorks.



1. Open System Security.

- **Windows 7**

- » Click on the Windows Start button.
- » Navigate to **Control Panel > System Security**.

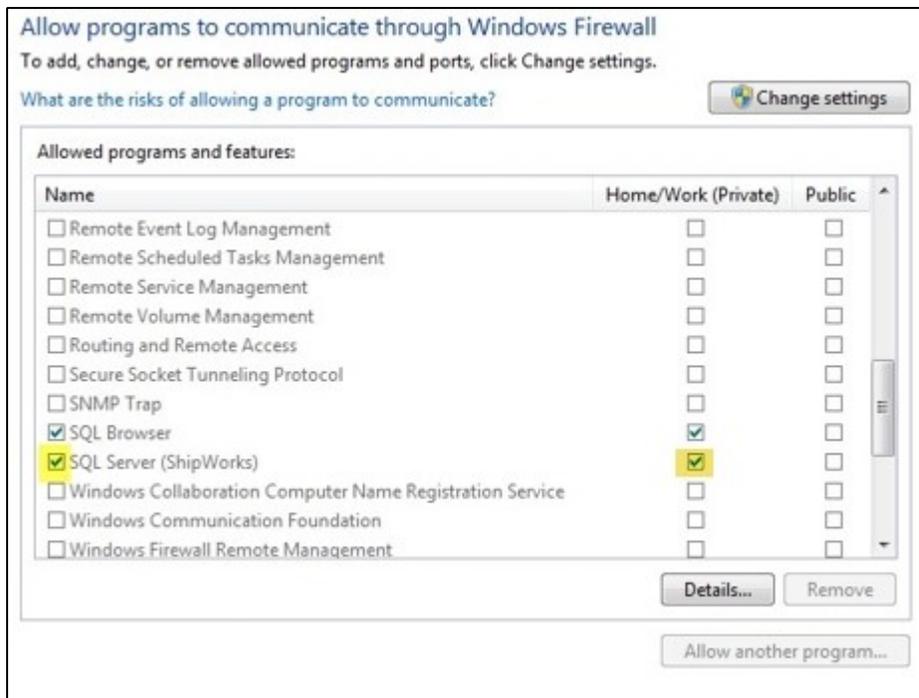
- **Windows 10**

- » Type **Security and Maintenance** into the **Type here to search field**. »
- Click on **Security and Maintenance** in the search results.

2. Click on **Windows Firewall**. Then, click on **Allow a program or feature through Windows Firewall**.



3. Locate **SQL Server (ShipWorks)** in the list of available programs. Then, check the boxes to allow SQL through the Home/Work Private firewall.



**Note:** If SQL Server (ShipWorks) is not available in the list of applications, click on the **Allow another program...** button. Then, select SQL Server (ShipWorks) and click **Add** to add it to the list of available programs.

4. Click **OK**.

## 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.