

## Procedure for Archiving:

**NOTE:** You will no longer be able to view archived Sales Orders, Purchase Orders or Inventory SKUS. You will be able to view the archived Sales Order information from the Customer or Inventory screen. You will not be able to see any information for archived SKUs. You will be able to view archived Payroll Checks and Accounts payable vouchers, but not A/P checks.

We recommend that you DO NOT archive any data from your current or prior fiscal year so that you will have full reporting capabilities. You must archive all prior calendar year payroll so the year to date totals are correct on your check stubs. This should be done after printing the W-2's for the year and before creating any payroll checks for the new year.

### Sales Orders, Purchase Orders and Inventory SKUS:

When sales orders are archived, all related purchase orders are also archived. An archived sales order will no longer appear on any printout. Since many people wish to print reports for last year's sales, you should not archive any sales orders for the current or prior fiscal year. The cutoff date for archiving sales orders should be the end of the fiscal year two years ago. Archiving sales orders will allow your system to continue processing new data and reports at the highest possible speed. If you never archive your sales orders, you will (after several years) begin to notice a slowdown when printing reports and posting sales. Archived sales orders can be un-archived if you ever need to print reports for old data. Sales Orders can be archived by choosing options S-P-3, and can be un-archived by choosing options S-P-5. Note that a sales order cannot be archived unless it is paid in full, fully delivered, and posted on or before the cutoff date specified in the archiving process. Also, every item sold on that sales order must have arrived on a P.O. which itself has been fully processed on or before the specified cutoff date. A purchase order is considered fully processed when 1) all of its merchandise has arrived, 2) the P.O. has been vouchered and posted, 3) all of the merchandise on the P.O. been sold, delivered, paid for and posted.

Inventory SKUs that are marked DI for discontinued and have no quantities on hand or on order may be archived after the associated Sales Orders and Purchase Orders are archived according to the above procedure. (I,P,/,1)

1. Change the stocking status on all discontinued SKUs to 'DI' for discontinued. (This is done from I,M,4-U to update, or from I,P,4-press Home on the item and change stocking status.)
2. Archive all sales orders. All PO's will automatically be archived when sales orders are archived. (This is done from S,P,3 – see note below.)
3. Archive the Inventory SKUs. (This is done from I,P,/,1.)
4. Only SKUs with no quantity on hand, on order or allocated will archive.

If your SKUs did not archive it is because they didn't meet the above criteria. If a SKU is marked DI for discontinued, it will no longer appear on pick lists. You may also exclude the discontinued SKUs from most inventory reports by using the Group Field Heading screen to exclude the DI stocking status.

### Accounts Payable:

If your Accounts Payable module is running slow, you may want to archive your vouchers. If you archive vouchers, you will archive the A/P checks that were used to pay the vouchers also. It is not recommended that you archive current or prior year vouchers. (A,A,P,1 – you will be asked for an ending cutoff date.)

### Payroll:

After the last payroll is issued for the calendar year, print the W-2's.  
Archive all payroll checks. (A,P,P,2)