

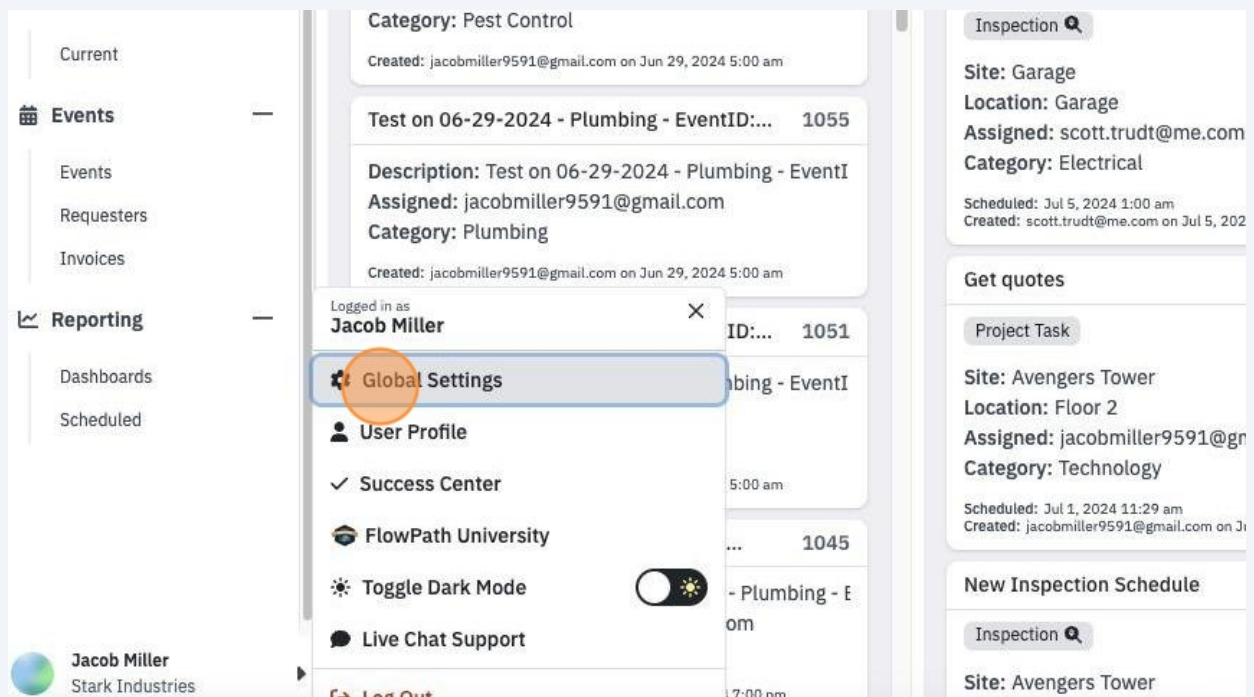
How To Archive And Un-Archive Accounts In Flowpath



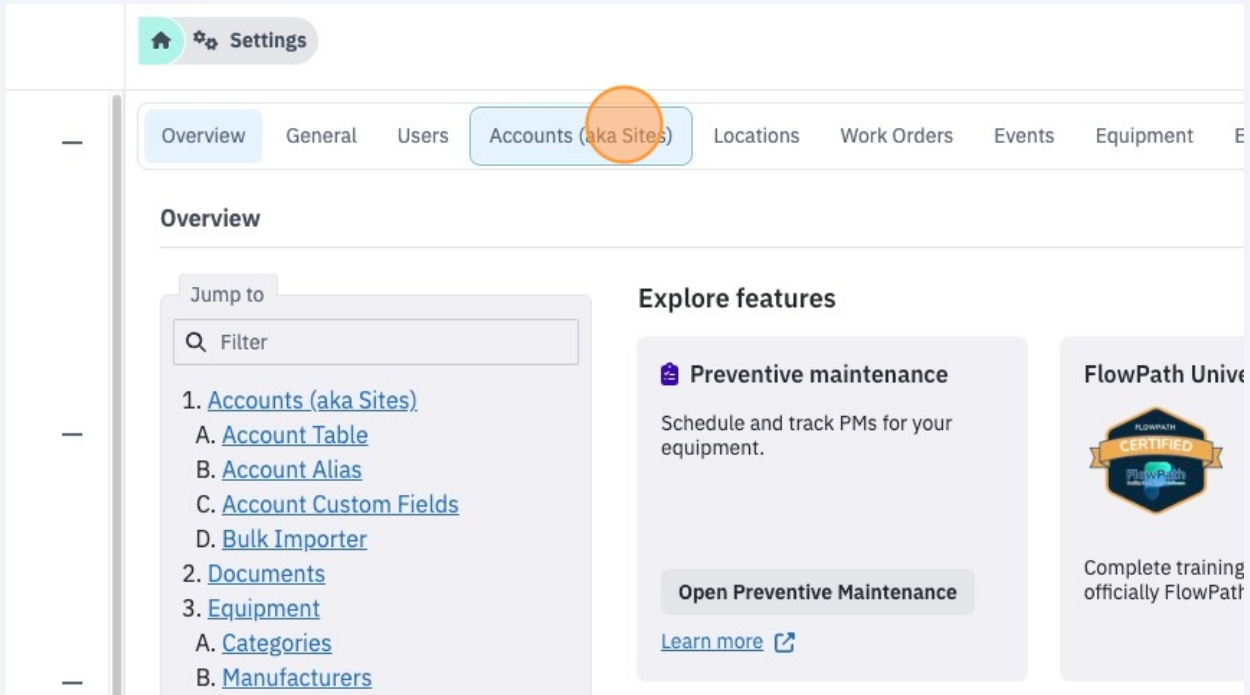
This guide provides steps on how to archiving and un-archiving accounts in FlowPath, making it easier to manage your workflow and keep your account list up to date.

1 Navigate to <https://app.getflowpath.com/work-orders>

2 Click "Global Settings"

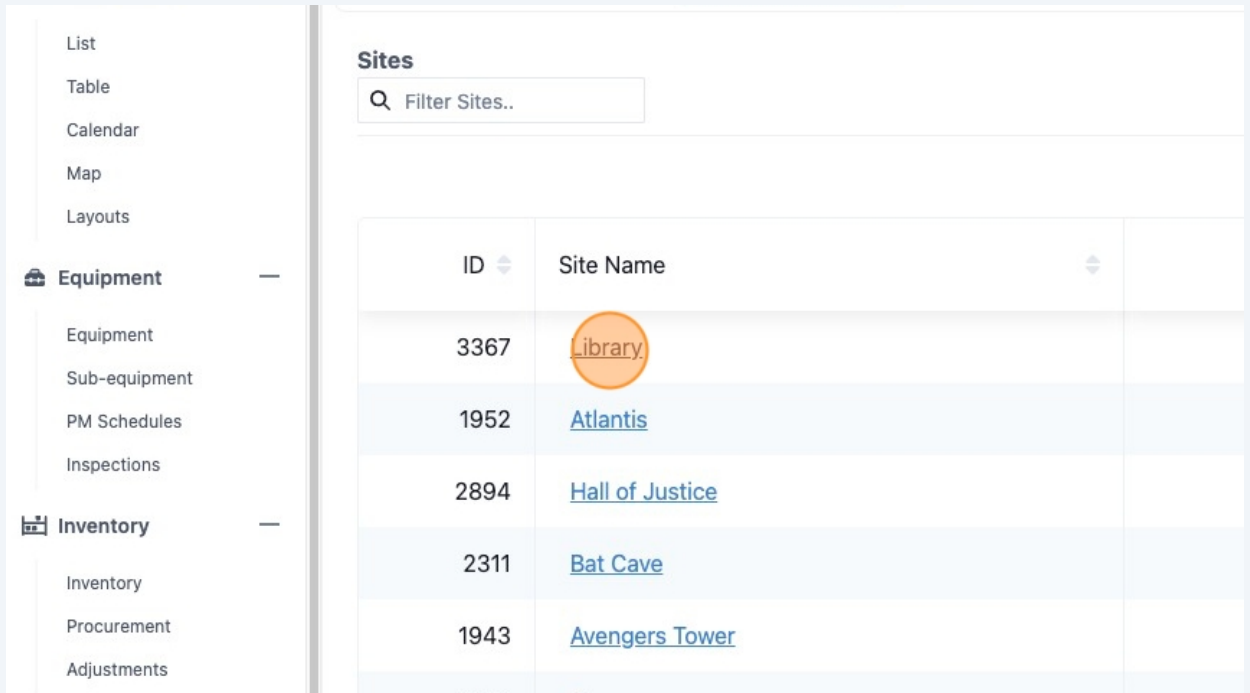


3 Click "Accounts (aka Sites)"



The screenshot shows the FlowPath Settings interface. At the top, there is a 'Settings' button with a gear icon. Below it, a horizontal navigation bar contains several tabs: 'Overview', 'General', 'Users', 'Accounts (aka Sites)', 'Locations', 'Work Orders', 'Events', and 'Equipment'. The 'Accounts (aka Sites)' tab is highlighted with an orange circle. Below the navigation bar, the 'Overview' section is visible. On the left, there is a 'Jump to' section with a search bar and a list of links: 1. [Accounts \(aka Sites\)](#) (with sub-links A. [Account Table](#), B. [Account Alias](#), C. [Account Custom Fields](#), D. [Bulk Importer](#)), 2. [Documents](#), 3. [Equipment](#) (with sub-links A. [Categories](#), B. [Manufacturers](#)). On the right, there is an 'Explore features' section with a 'Preventive maintenance' card that says 'Schedule and track PMs for your equipment.' and an 'Open Preventive Maintenance' button. To the right of that is a 'FlowPath Univer' card with a 'CERTIFIED' badge and the text 'Complete training officially FlowPatr'.

4 Click the account you want to archive.

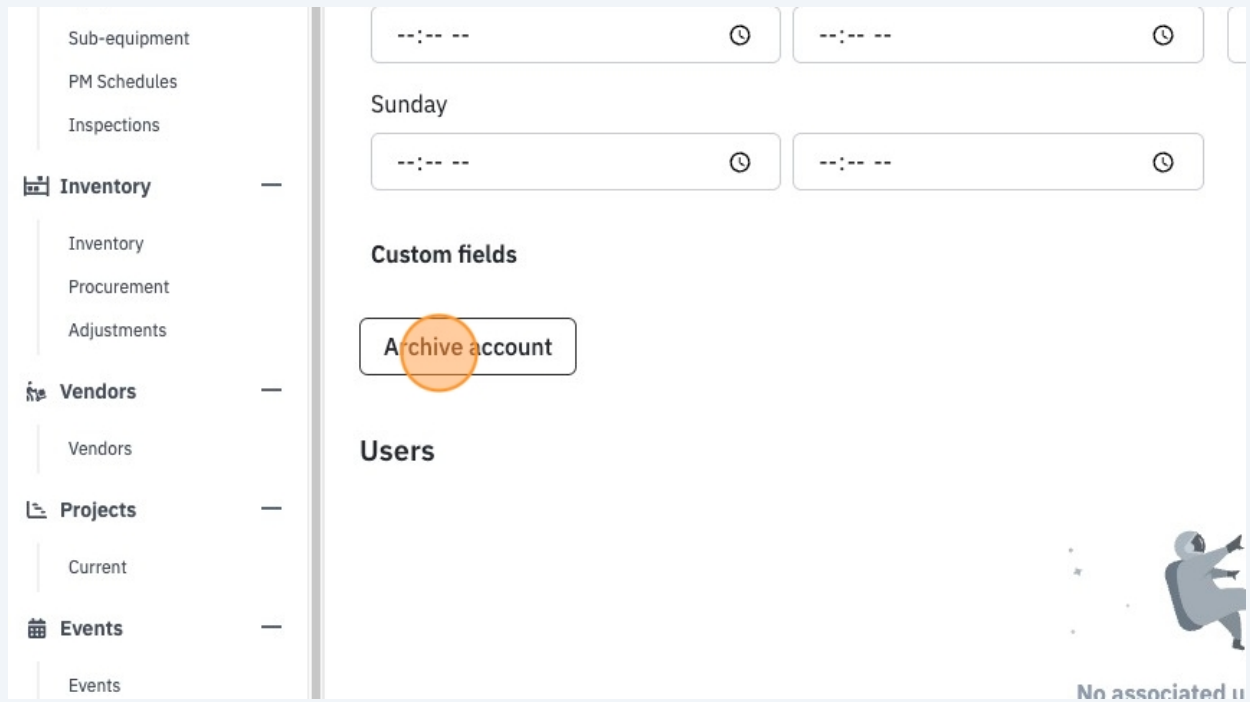


The screenshot shows the FlowPath 'Sites' page. On the left, there is a sidebar with a list of navigation items: 'List', 'Table', 'Calendar', 'Map', 'Layouts', 'Equipment' (with a sub-menu containing 'Equipment', 'Sub-equipment', 'PM Schedules', and 'Inspections'), and 'Inventory' (with a sub-menu containing 'Inventory', 'Procurement', and 'Adjustments'). The 'Equipment' item is highlighted. The main area is titled 'Sites' and contains a search bar labeled 'Filter Sites..'. Below the search bar is a table with the following data:

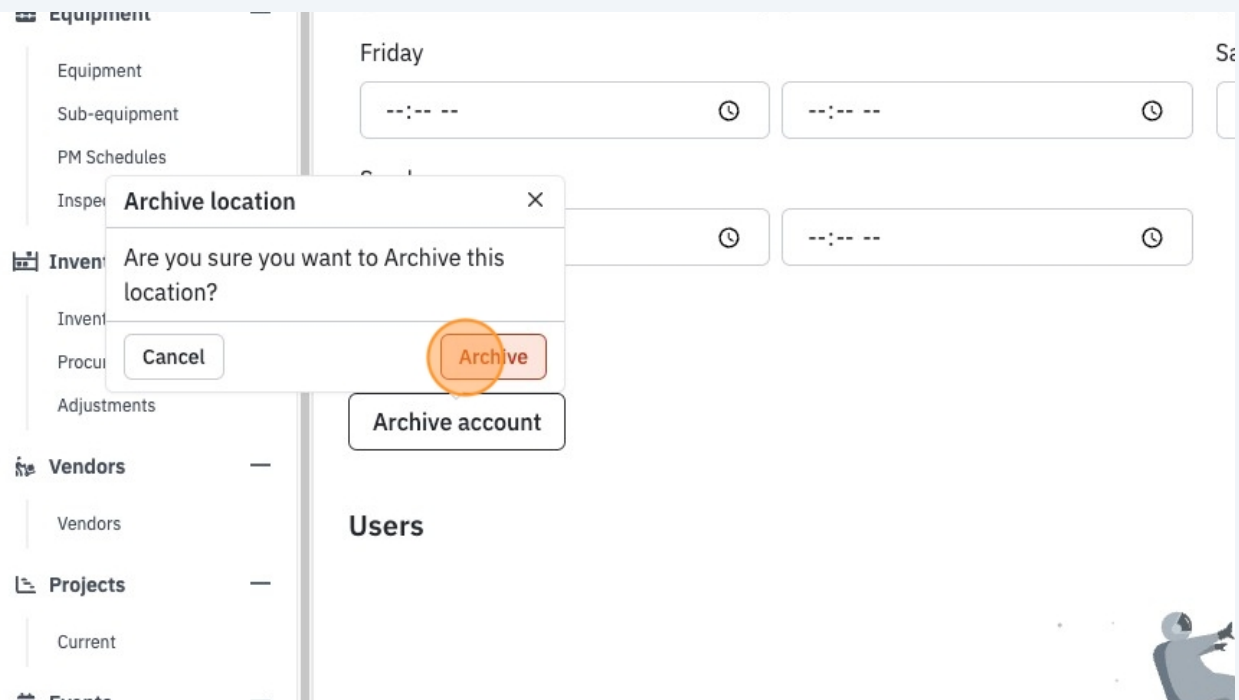
ID	Site Name
3367	Library
1952	Atlantis
2894	Hall of Justice
2311	Bat Cave
1943	Avengers Tower

The 'Library' site is highlighted with an orange circle.

5 Click "Archive account"



6 Click "Archive"



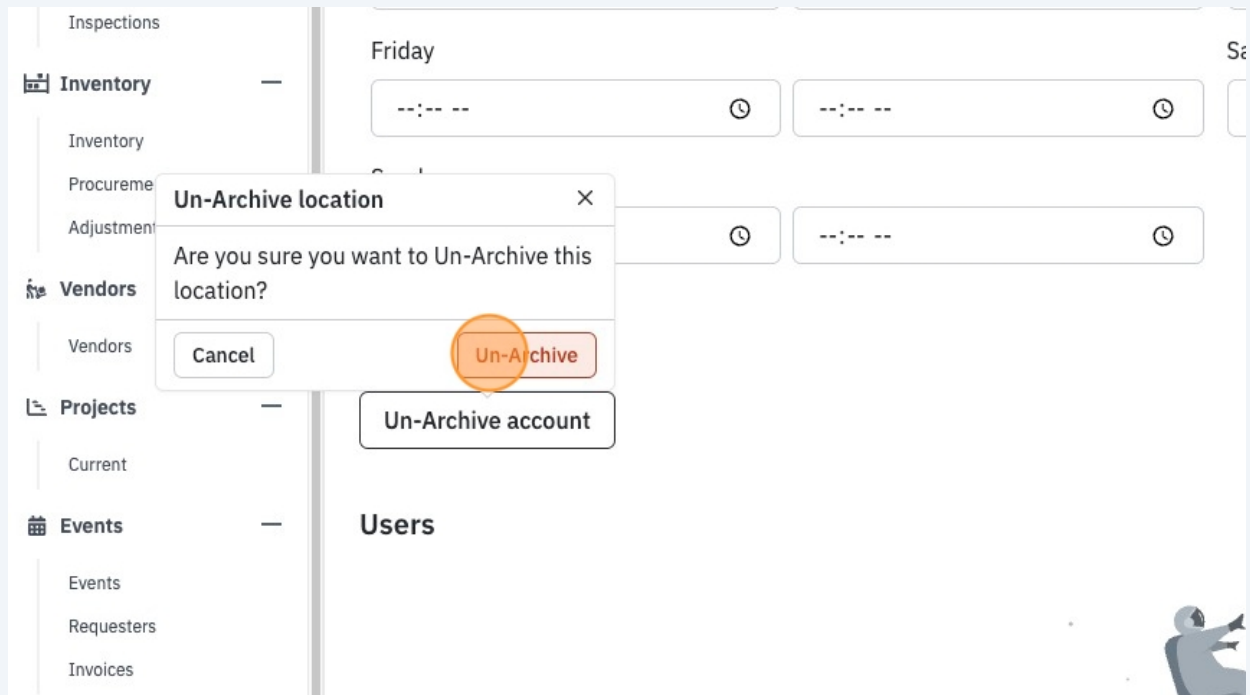
7 Site will be updated, click "Dismiss"

The screenshot shows a software interface with a top navigation bar containing links: Accounts (aka Sites), Locations, Work Orders, Events, Equipment, External Forms, Integrations, and Inventory. A dark blue notification banner at the top center displays a green checkmark, the text 'Site updated.', and an orange 'Dismiss' button. Below the notification, a calendar view is visible, showing dates for Tuesday, Thursday, and Saturday. Each date has a corresponding time slot with a clock icon and a placeholder text '--:-- --'.

8 Click "Un-Archive account" if you want to have the account active again.

The screenshot shows a software interface with a sidebar menu on the left containing sections: Inventory (with sub-items: Inventory, Procurement, Adjustments), Vendors (with sub-item: Vendors), Projects (with sub-item: Current), Events (with sub-items: Events, Requesters, Invoices), and Reporting. The main content area on the right has a header with a date picker showing '--:-- --' and a clock icon. Below this, the text 'Sunday' is displayed. A 'Custom fields' section contains a button labeled 'Un-Archive account', which is highlighted with an orange circle. Below this, the text 'Users' is visible. The bottom right corner of the interface features a small illustration of a person sitting on the ground.

9 Click "Un-Archive"



10 Site will be updated, click "Dismiss"

