



## Hide Dormant Records

### **Purpose of this document**

Hide Dormant Records is an enhancement in Ceres that allows users to exclude blocked or dormant master records for Agency, Donors, Vendors, or Items from Lists. Any record marked as dormant will be filtered and that record will not appear on the List. This way the user only sees records that are active. Filters can be removed so the user can see dormant records as needed.

*Ceres Object release 5.00.00 is required for the functionality described in this document.*

# Table of Contents

---

<b>HIDE DORMANT RECORDS .....</b>	<b>3</b>
<b>RELATED TOPICS.....</b>	<b>4</b>

## Hide Dormant Records

1. To mark a record as dormant, toggle the Dormant field on the General FastTab of the Agency, Donor, Vendor, or Item Card.

The screenshot shows the 'Edit - Agency Card - C0242 - Victory Outreach' form. The 'Dormant' checkbox is checked and highlighted with a red circle. The form includes fields for Agency No., Parent Agency No., Name, Address, City, State, ZIP Code, Balance (\$), Credit Limit (\$), Fund No., Location Code, Shipment Method Code, FBC County Code, FBC Agency Category Code, UNC Activity Status, Agency Approval Date, Agency First Order Date, Monitoring Expiration Date, Last Modified By, and Blocked.

2. Toggling the Dormant field on the Card automatically sets the filter value to Yes and excludes this record from displaying on the associated List.

The screenshot shows the 'Agencies' list view. The filter 'Dormant is No' is selected and highlighted with a red circle. A red arrow points to the row for 'Renaissance West'.

No.	Name	Address	City	State
B3055	Willow Domestic Violence	Do Not Disclose		KS
B3201	Young Womens Christian A...	Do Not Disclose		KS
C0350	Renaissance West	P.O. Box 260	Independence	MO
C0416	The Salvation Army	1351 E 10th St	Kansas City	MO
C0546	Kansas City Community Ce...	1730 Prospect Ave	Kansas City	MO
C0692	Substance Abuse Center	3505 Rainbow Boulevard	Kansas City	KS

**Note:** In the screen shot above, Agency B0686 was marked as Dormant so the record no longer displays on the List when the Dormant filter value is set to No.

3. To view all records (dormant and active) on the List, clear the Dormant field or set filter value to Yes and No.

The screenshot shows a web interface for 'Agencies'. At the top left, there is a dropdown menu labeled 'Agencies'. Below it, the text 'Show results:' is followed by two filter conditions: 'Where Blocked is' and 'And Dormant is'. The 'And Dormant is' filter has a dropdown menu currently set to 'No; Yes'. A red circle highlights this dropdown, and a red arrow points from it to the 'C0242' record in the table below. The table has columns for 'No.', 'Name', 'Address', 'City', 'State', and 'ZIP Code'. The records listed are:

No.	Name	Address	City	State	ZIP Code
B3055	Willow Domestic Violence	Do Not Disclose		KS	
B3201	Young Womens Christian A...	Do Not Disclose		KS	
C0242	Victory Outreach	2411 Kensington Avenue	Kansas City	MO	64127
C0350	Renaissance West	P.O. Box 260	Independence	MO	64051
C0416	The Salvation Army	1351 E 10th St	Kansas City	MO	64106
C0460	Welcome House Inc	1414 East 27th Street	Kansas City	MO	64108
C0486	Salvation Army-S.O.S.	6723 State Ave	Kansas City	KS	66102
C0546	Kansas City Community Ce...	1730 Prospect Ave	Kansas City	MO	64127

## Related Topics

1. Agency Overview
2. Donor Overview
3. Vendor Overview
4. Item Overview