



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.

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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 'General' tab is active. 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 'Where Blocked is No' is selected. The record for 'C0350 Renaissance West' is highlighted with a red circle and an arrow pointing to it.

| 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.

Agencies ▾

Show results:

✕ Where

Blocked ▾

is

✕ And

Dormant ▾

is

No; Yes ▾

+

 Add Filter

| 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