

MEMBER BUSINESS
SOLUTIONS



Hide Dormant Records

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Purpose of this document

This document discusses how to exclude blocked or dormant master records for Agency, Donors, Vendors, or Items from Lists in Ceres.

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Purpose

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 4.00.00 is required for the functionality documented in this procedure.

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 - B0686 - Safe Home, Inc.' window. The 'General' tab is active, displaying various fields for the agency. The 'Dormant' checkbox is checked and circled in red. The 'Agency Sales Histor...' and 'Agency Statistics - B...' panels are also visible on the right side of the card.

General	
No.:	B0686
Parent Agency No.:	686
Name:	Safe Home, Inc.
Address:	Do Not Disclose
City:	
State:	KS
ZIP Code:	
Country/Region Code:	
Phone No.:	
Phone Ext. No.:	
Primary Contact No.:	
Contact:	Rachael Beebe
Dormant:	<input checked="" type="checkbox"/>

Agency Sales Histor...	
Agency No.:	B0686
Orders:	1
Invoices:	1
Return Orders:	0
Credit Memos:	0
Pstd. Shipments:	22
Pstd. Invoices:	21
Pstd. Return Rec...:	5
Pstd. Credit Me...:	8

Agency Statistics - B...	
Agency No.:	B0686
Balance (\$):	2,815.00
Sales	
Outstanding Or...	0.00
Shipped Not Inv...	0.00
Outstanding Inv...	0.00
Total (\$):	2,815.00
Credit Limit (\$):	1,000.00
Overdue Amoun...	2,815.00
Total Distribute...	0.00
lbs. Distributed:	29,699.00

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.

Agencies ▾ No. ▾ → ^

Show results:

✕ Where Blocked ▾ is

✕ And Dormant ▾ is No

+ Add Filter

No.	Name	Address	City	State	ZIP Code	Per... Web Ord...	Locati Code
B0459	Safe Home, Inc.	Do Not Disclose		KS		<input type="checkbox"/>	HOU
B1007	F.A.I.T.H., Inc.	Do Not Disclose		MO		<input checked="" type="checkbox"/>	
B1404	Synergy Services-	Do Not Disclose		MO		<input checked="" type="checkbox"/>	
B3055	Willow Domestic Violence	Do Not Disclose		KS		<input checked="" type="checkbox"/>	
B3201	Young Womens Christian A...	Do Not Disclose		KS		<input checked="" type="checkbox"/>	
C0168	Community House Inc	3000 Campbell Street	Kansas City	MO	64109	<input type="checkbox"/>	

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.

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

Agencies ▾ No. ▾ → ^

Show results:

✕ Where Blocked ▾ is

✕ And Dormant ▾ is No; Yes

+ Add Filter

No.	Name	Address	City	State	ZIP Code	Per... Web Ord...	Locati Code
B0458	House of Hope, Inc.	Do Not Disclose		MO		<input checked="" type="checkbox"/>	HOU
B0459	Safe Home, Inc.	Do Not Disclose		KS		<input type="checkbox"/>	HOU
B0558	Hope House, Inc.	Do Not Disclose		MO		<input checked="" type="checkbox"/>	HOU
B0686	Safe Home, Inc.	Do Not Disclose		KS		<input type="checkbox"/>	HOU
B1007	F.A.I.T.H., Inc.	Do Not Disclose		MO		<input checked="" type="checkbox"/>	
B1404	Synergy Services-	Do Not Disclose		MO		<input checked="" type="checkbox"/>	
B3055	Willow Domestic Violence	Do Not Disclose		KS		<input checked="" type="checkbox"/>	
B3201	Young Womens Christian A...	Do Not Disclose		KS		<input checked="" type="checkbox"/>	
C0168	Community House Inc	3000 Campbell Street	Kansas City	MO	64109	<input type="checkbox"/>	
C0242	Victory Outreach	2411 Kensington Avenue	Kansas City	MO	64127	<input type="checkbox"/>	
C0350	Renaissance West	P.O. Box 260	Independence	MO	64051	<input type="checkbox"/>	

Related Topics:

1. [Agency Overview](#)
2. [Donor Overview](#)
3. [Vendor Overview](#)
4. [Item Overview](#)