

Creating a Currency Field

Last Modified on 06/13/2024 11:17 am EDT

Overview

A **Currency** field allows users to enter currency values into an input text, tables, or PDF form. The Number field can also display trending data when added to a standard form on an object type.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the create a numeric field.

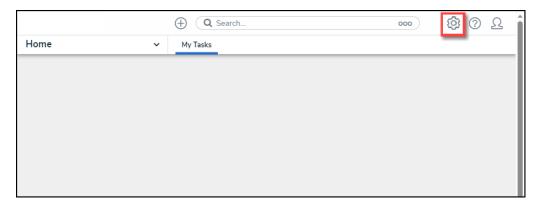
Related Information/Setup

Please refer to the Trending Tables article for more information on values changing over multiple timeframes using Trending Tables.

Please refer to the Creating a Number Field article for more information on creating currency fields.

Navigation

1. From the *Home* screen, click the **Administration** icon.



Administration Icon

2. From the *Admin Overview* screen, click the **Fields** tile on the *Data Model* section.



	\oplus) Q Search		···· 贷 ⑦ 오
Admin Overview	~			
Data Model			Views	
Object Types		Object Type Groups	Configurable Forms	Data Visualizations
o o Fields	Assessments	Data Definitions		



3. From the *Admin: Fields*, click the +Create Field button.

	⊕ Q Sear	ch			000	\$ \$	<u>م</u>
Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition		
Admin: Fields						+ CREATE FIELD	
Q Search							
App Base Version SELECT LIST							
Location Photo IMAGE							
# of Samples Failed NUMERIC							
# of Samples Tested NUMERIC							
Abbreviation PLAIN TEXT							+



Creating a Numeric Field

 From the *Which type of would you like to create?* pop-up, hover your cursor over the Numeric field.



	(Q Search				
Data Model	✓ Object Types Ob	bject Type Groups Fie	ds Assessments	Data Definition	
Admin: Field	S				+ CREATE FIELD
Q Search	/hich type of Field would you like to cre	eate?		×	
App Base Ve	Text		Text		
Location Pho	A text box allowing a single line or m	ultiple lines of text.			
# of Samples					
# of Samples	Numeric A numeric field allowing any numbers	s to be entered. This is an	Numeric	LD	
Abbreviation	unformatted number.				
Academic Ac	Date & Time		Date & Time		_
Account Bala	A picker that allows selection of a dat	te and optional time.		~	
Account Risk					
Active SELEC	Select List A list of options to be selected from.		Select List	~	
Activity PLA					

Numeric Field

2. Click the Create Field button.

	⊕ (Q :					
Data Model	✓ Object Types	Object Type Groups	Fields	Assessments	Data Definition	
Admin: Fields					[+ CREATE FIELD
Q Search	ich type of Field would you l	ike to create?			×	
App Base Ve	Text	1		Text		
# of Samples	A text box allowing a single	ine or multiple lines of text.				
# of Samples	Numeric A numeric field allowing any	numbers to be entered. This	sisan	Numeric		
Abbreviation	unformatted number.	numbers to be entered. This	515 dif			
Academic Ac	Date & Time					
Account Bala	A picker that allows selectio	n of a date and optional time	ŧ.	Date & Time	~	
Account Risk						
Active SELEC	Select List			Select List		
Activity PLA	A list of options to be select	ed from.			~	v

Create Field Button

 From the *Admin: Create a Field* screen, enter the field name in the Field Name field. The Field Name can be used on object types throughout the system.



) Q Sea	irch			000	<u>نې</u>	?	Ω	ĺ
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Admin:Creat	e a Fie	ld								
Field Type										
* Field Name										
CAD Currency										
Long Name 😧										
Description									_/i	
Description										

Field Name Field

(Optional) enter additional information or alternate phrasing in the Long Name field.
 Information entered in the Long Name field can appear on forms.

	⊕ Q Sear	ch			000	ŝ	?	Ω
Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
Admin : Create a Fie	ld							
Field Type								
* Field Name								
CAD Currency								
Long Name 😢								
Canadian Currency								
Description								

Long Name Field

 (Optional) Enter a field description explaining the function of the field in the Description field. The Description field gives users more information about a field.



	🕀 🔍 Q Sea	rch			000	ঞ	?	Ω
ata Model	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
Admin : Create a F	ield							
Field Type								
* Field Name								
CAD Currency								
Long Name 😧								
Canadian Currency								
Description								

Description Field

6. (Optional) Enter the minimum number of characters allowed in the Minimum Characters field (the value must be a whole number). The Minimum Characters field value must be less than or equal to the Maximum Characters field value.

		🕀 🔍 Q Sea	arch			000	(මු	2
ata Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition		
Minimum Characters								
4								
Minimum Characters is option	nal. It must be	a whole number less	than or equal to Maximum (Characters (if set).			
Maximum Characters								
e.g. 10, 140, etc.								
Maximum Characters is optic	nal. It must be	e a whole number gre	ater than or equal to Minimu	m Characters (if	set).			
Number Type 💡								
Number								~
PREVIEW								
						CANCEL	✓ CRE/	ATE

Minimum Characters Field

 (Optional) Enter the maximum number of characters allowed in the Maximum Characters field (the value must be a whole number). The Maximum Character field value must be greater than or equal to the Minimum Character field value.



	🕀 🔍 Q Sea	rch			000	<u>نې</u>	?	Ω
Data Model 🗸 🗸	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
Minimum Characters								
4								
Minimum Characters is optional. It must l	be a whole number less	than or equal to Maximum C	haracters (if set	.).				
Maximum Characters								
6								
Maximum Characters is optional. It must	be a whole number grea	ater than or equal to Minimu	m Characters (if	set).				
Number Type 😧								
Number								~
PREVIEW								
							REATE	
					CANCEL	V CF		

Maximum Characters Field

- 8. Select a the **Currency** field type from the **Number Type** dropdown menu:
 - **Number:** A field that allows users to enter a numeric value.
 - **Currency:** A field that allows users to enter a currency value.

		⊕ Q Sea	rch			000	(j)	?	Ω	
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition				
Minimum Characters										
4										
Minimum Characters is o	ptional. It must be	e a whole number less	than or equal to Maximum Cl	haracters (if set)						
Maximum Characters										
6										
Maximum Characters is o	optional. It must b	e a whole number grea	ter than or equal to Minimun	n Characters (if s	set).					
Number Type 💡										
Number									~	
Number									-	
Currency										
PREVIEW										
						CANCEL	✓ CF	REATE		

Number Type Dropdown Menu

9. Select a county currency code from the **Currency** dropdown menu.





ata Model	 Object Types 	Object Type Groups	Fields	Assessments	Data Definition		
Minimum Characters is optional. It mu			haracters (if set).		 	_
Maximum Characters			,	,			
Maximum Characters							
6							
Maximum Characters is optional. It mu	ust be a whole number or	eater than or equal to Minimu	m Characters (if	set)			
	ust be a whole number gre	ater than or equal to Minimu	in characters (ii	sey.			
Number Type 😧							
Currency							~
currency							
* Currency							
							<u> </u>
Select							Ľ
Select							
\$ AUD							
\$ CAD							
S HKD							
\$ NZD \$ USD							
£ GBP							
€EUR							
FCHF							
¥CNY							

Currency Dropdown Menu

10. Click the Create button to create the new Currency field. The screen will refresh and automatically create a Unique Name for the Currency field, which can be seen within the Unique Name field. The Unique Name is used in APIs, custom forms, formulas, import tools, and data warehouses.

			rch			000	තු	?	Ω
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition			
Admin: Editi	ng Field	l							
Field Type									
* Field Name									
CAD Currency									
Unique Name 🏾 🔮									
CADCURRENC								•	

Unique Name Field

10. Once the Currency field is created, a preview of how the field will look like when added to a form within the system will appear within the **Preview** section. You may need to scroll to the **Preview** section to view the field after clicking the **Create** button.



🕀 🔍 🔾 Sea	⊕ (Q Search				ŝ	?	Ω	^
Object Types	Object Type Groups	Fields	Assessments	Data Definition				
							٦	
							5	
							-	
biect Types:								
this Field								
				Û				I
	Object Types bbject Types:	Object Types Object Type Groups	Object Types Object Type Groups Fields	Object Types Object Type Groups Fields Assessments	Object Types Object Type Groups Fields Assessments Data Definition	Object Types Object Type Groups Fields Assessments Data Definition	Object Types Object Type Groups Fields Assessments Data Definition bbject Types:	Object Types Object Type Groups Field

Preview Section