

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.

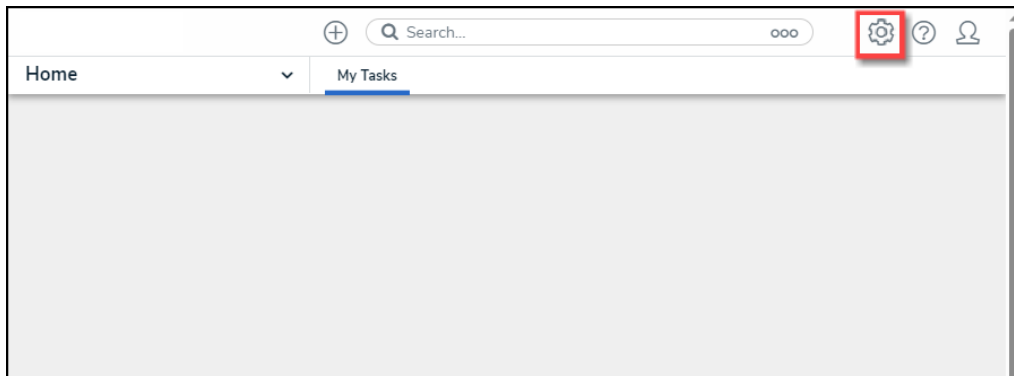
Related Information/Setup

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.

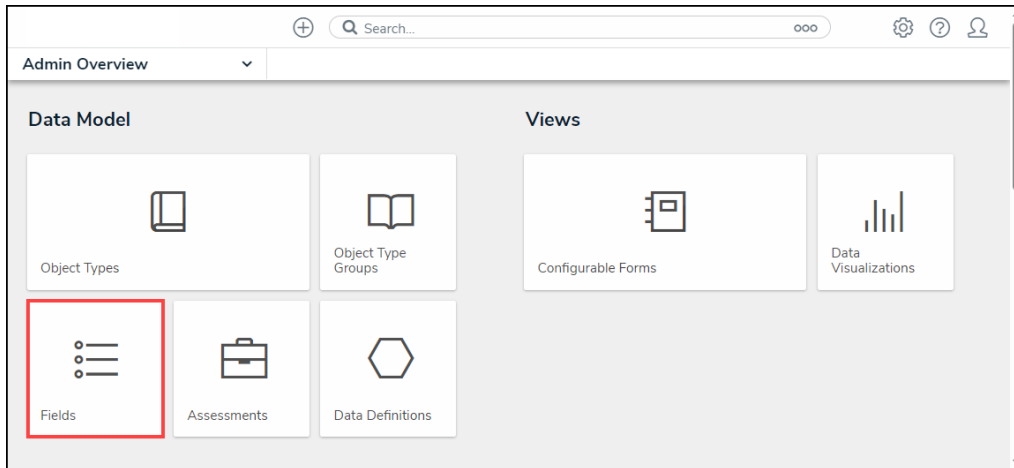
Navigation

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



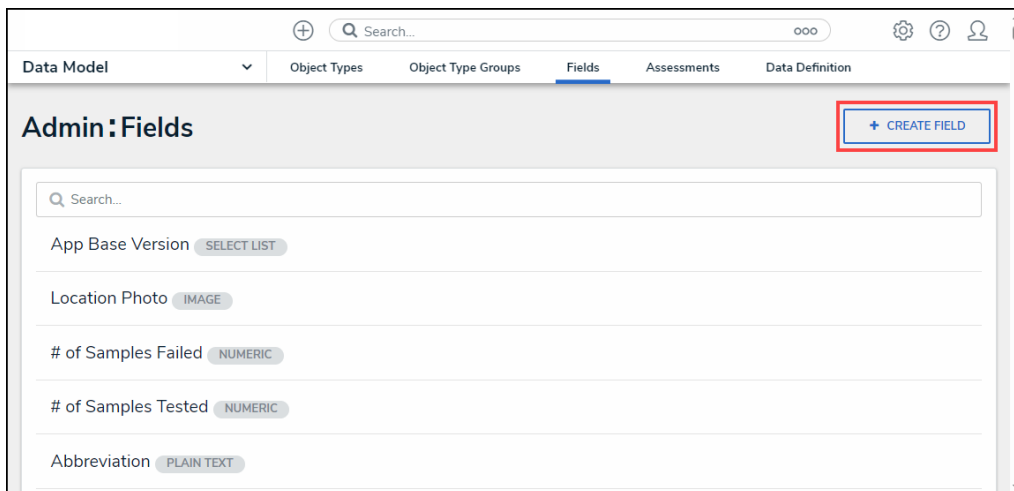
Administration Icon

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



Fields Tile

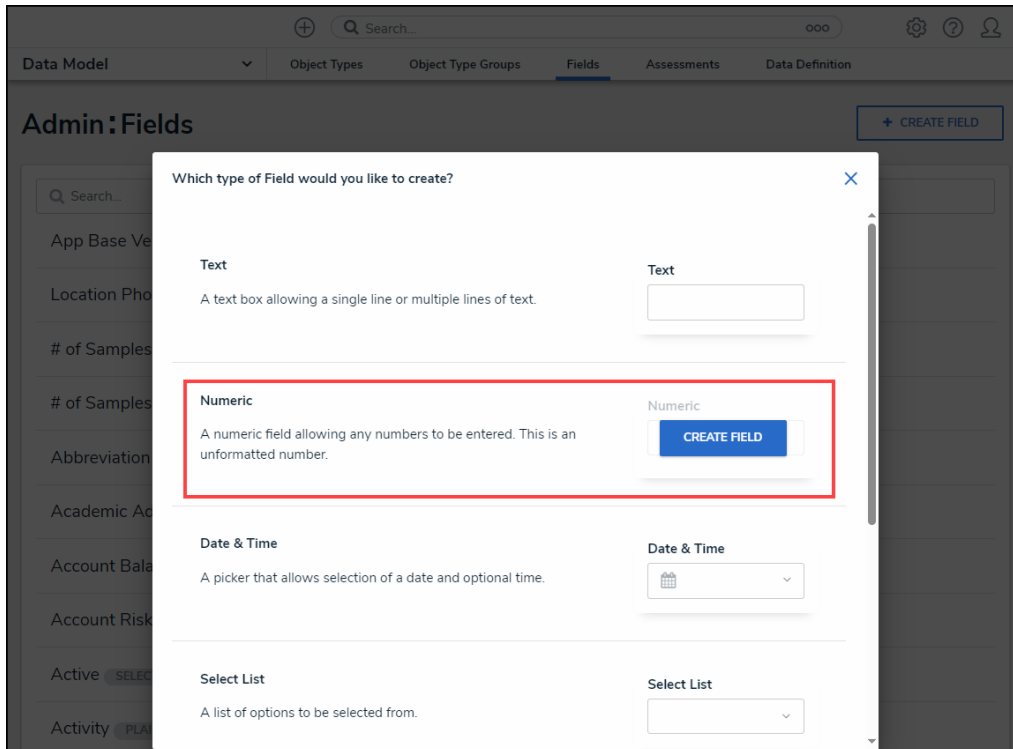
3. From the **Admin: Fields**, click the **+Create Field** button.



+Create Field Button

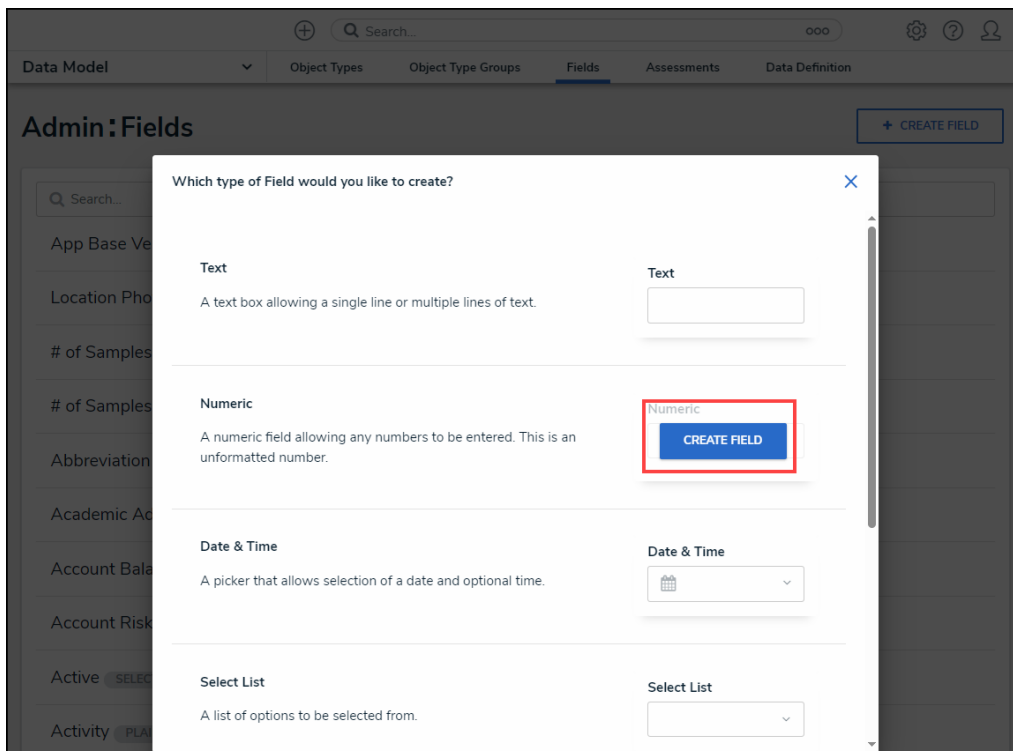
Creating a Numeric Field

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



Numeric Field

2. Click the **Create Field** button.



Create Field Button

3. 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.

The screenshot shows the 'Admin: Create a Field' form in the Resolver application. The form is titled 'Admin: Create a Field' and is located under the 'Fields' tab. The form contains several fields: 'Field Type' (set to 'Numeric'), '* Field Name' (set to 'CAD Currency'), 'Long Name' (empty), and 'Description' (empty). The '* Field Name' field is highlighted with a red box.

Field Name Field

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

The screenshot shows the 'Admin: Create a Field' form in the Resolver application. The form is titled 'Admin: Create a Field' and is located under the 'Fields' tab. The form contains several fields: 'Field Type' (set to 'Numeric'), '* Field Name' (set to 'CAD Currency'), 'Long Name' (set to 'Canadian Currency'), and 'Description' (empty). The 'Long Name' field is highlighted with a red box.

Long Name Field

5. **(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.

The screenshot shows the 'Admin: Create a Field' form in the Resolver application. The form is titled 'Admin: Create a Field' and is located in the 'Fields' tab. The form contains several fields: 'Field Type' (set to 'Numeric'), '*Field Name' (set to 'CAD Currency'), 'Long Name' (set to 'Canadian Currency'), and 'Description'. The 'Description' field is highlighted with a red border.

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.

The screenshot shows the 'Admin: Create a Field' form in the Resolver application. The form is titled 'Admin: Create a Field' and is located in the 'Fields' tab. The form contains several fields: 'Minimum Characters' (set to '4'), 'Maximum Characters' (set to 'e.g. 10, 140, etc.'), and 'Number Type' (set to 'Number'). The 'Minimum Characters' field is highlighted with a red border.

Minimum Characters Field

7. **(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.

The screenshot shows the 'Fields' configuration page in the Resolver application. The 'Maximum Characters' field is highlighted with a red box. The 'Minimum Characters' field contains the value '4' and the 'Maximum Characters' field contains the value '6'. The 'Number Type' dropdown menu is set to 'Number'. The page includes a search bar, navigation tabs, and a 'CREATE' button.

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.

The screenshot shows the 'Fields' configuration page in the Resolver application. The 'Number Type' dropdown menu is open, showing 'Number' and 'Currency' options. The 'Currency' option is highlighted with a red box. The 'Minimum Characters' field contains the value '4' and the 'Maximum Characters' field contains the value '6'. The page includes a search bar, navigation tabs, and a 'CREATE' button.

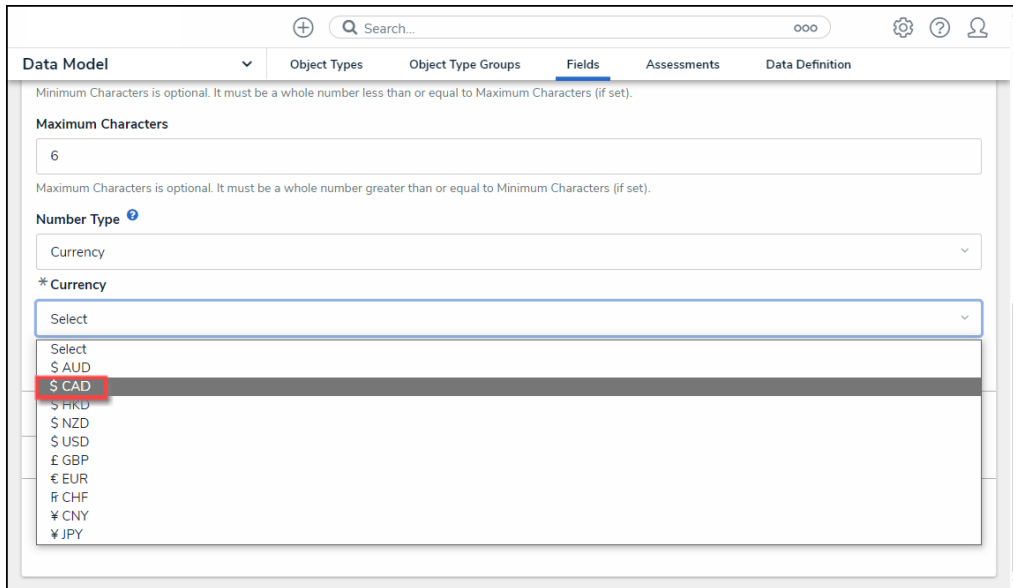
Number Type Dropdown Menu

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



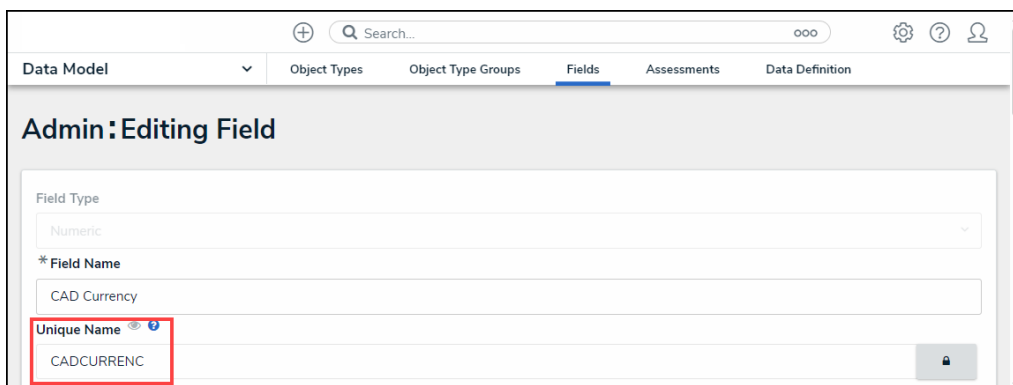
Note:

Country currency symbols can be displayed on Report tables, Repeatable Tables, Pie Charts with export to Excel, Word, or PDF and Data Grid Tables with export to Excel.



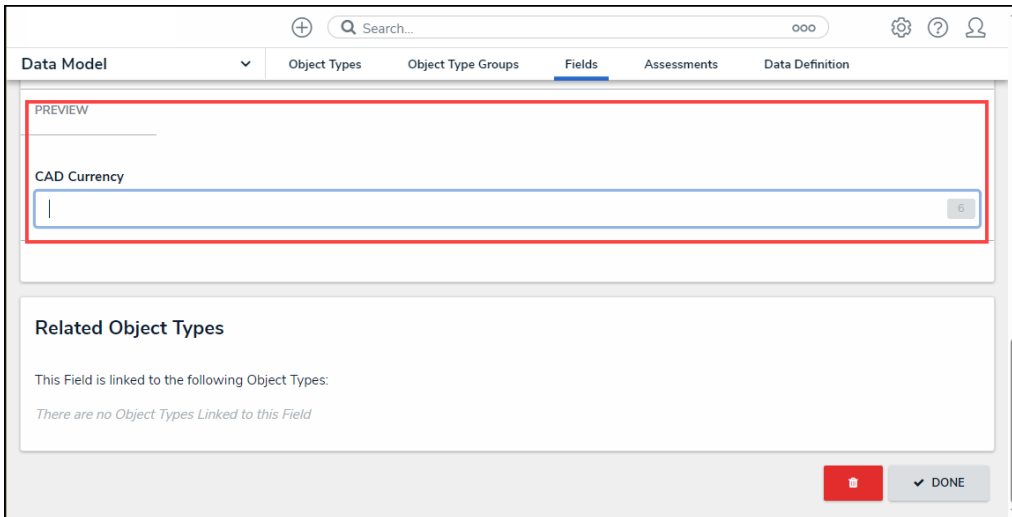
Currency Dropdown Menu

- 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.



Unique Name Field

- 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.



Preview Section