

Creating a Currency Field

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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.

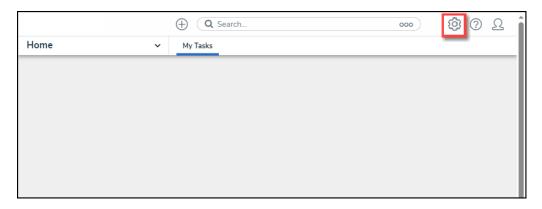
Related Information/Setup

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 **System** icon.



System Icon

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



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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.

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# of Samples Failed NUMERIC							
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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.



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Numeric Field

2. Click the Create Field button.

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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.



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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.

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Admin : Create a Fie	ld							
Field Type								
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CAD Currency								
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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.



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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.

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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								~
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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.



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Maximum Characters								
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Maximum Characters is optional. It must	be a whole number grea	ater than or equal to Minimu	m Characters (if	set).				
Number Type 😧								
Number								~
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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.

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Number Type Dropdown Menu

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





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\$ NZD \$ USD							
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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.

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Unique Name 🏾 🔮									
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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.



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Preview Section