

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.

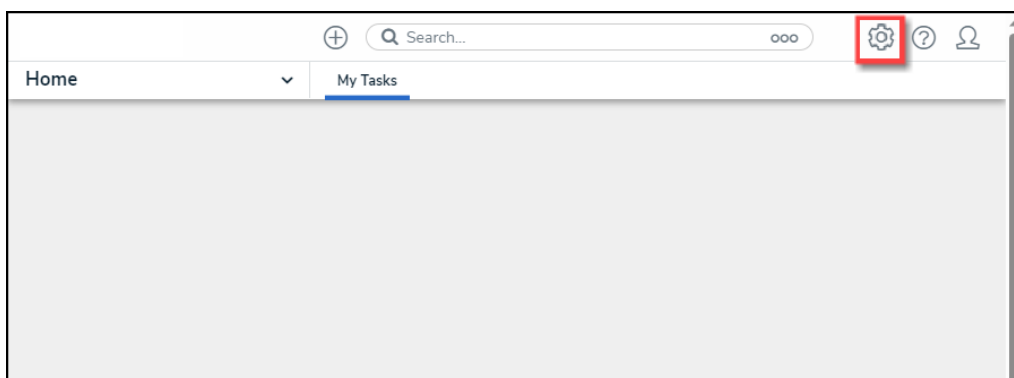
Related Information/Setup

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.

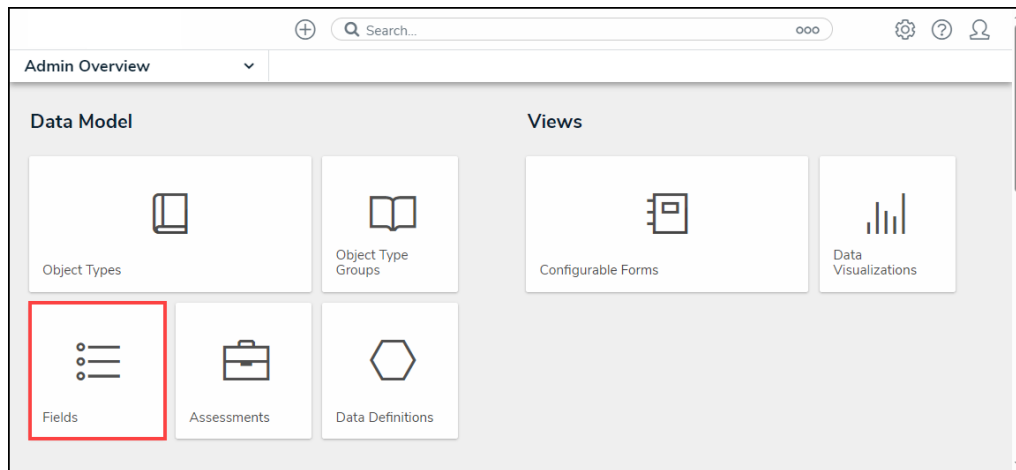
Navigation

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



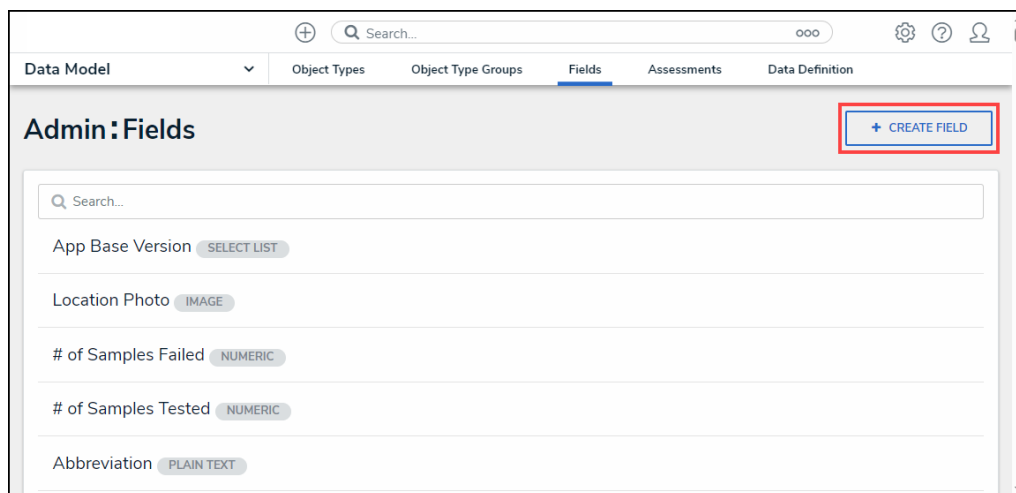
Administration Icon

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



Fields Tile

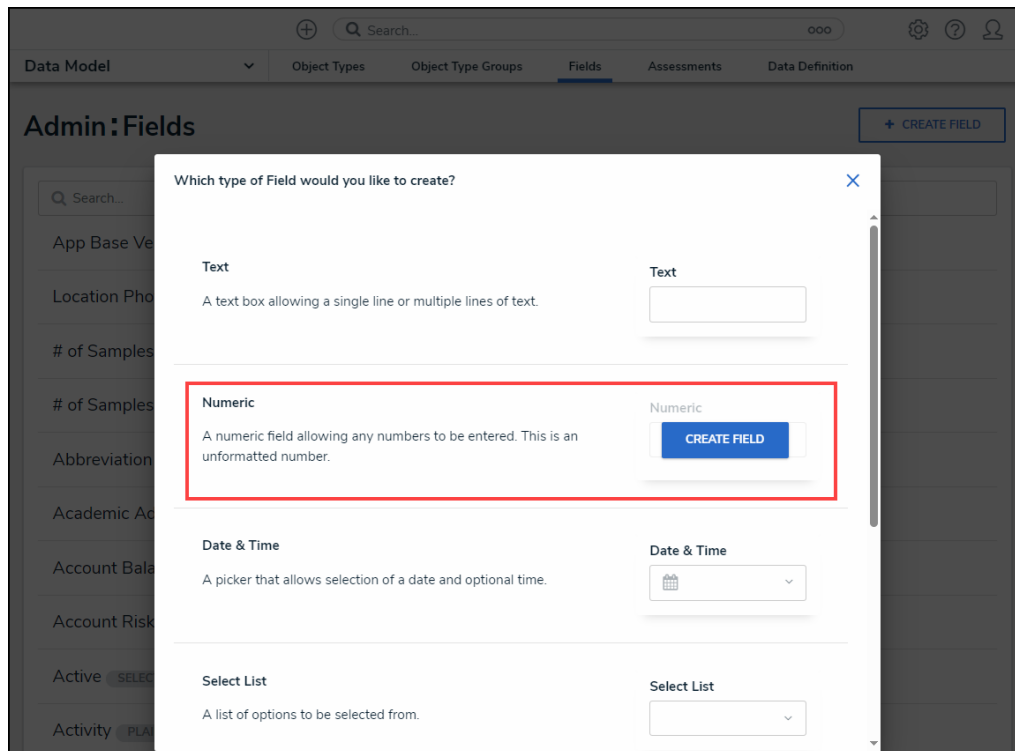
- From the **Admin: Fields**, click the **+Create Field** button.



+Create Field Button

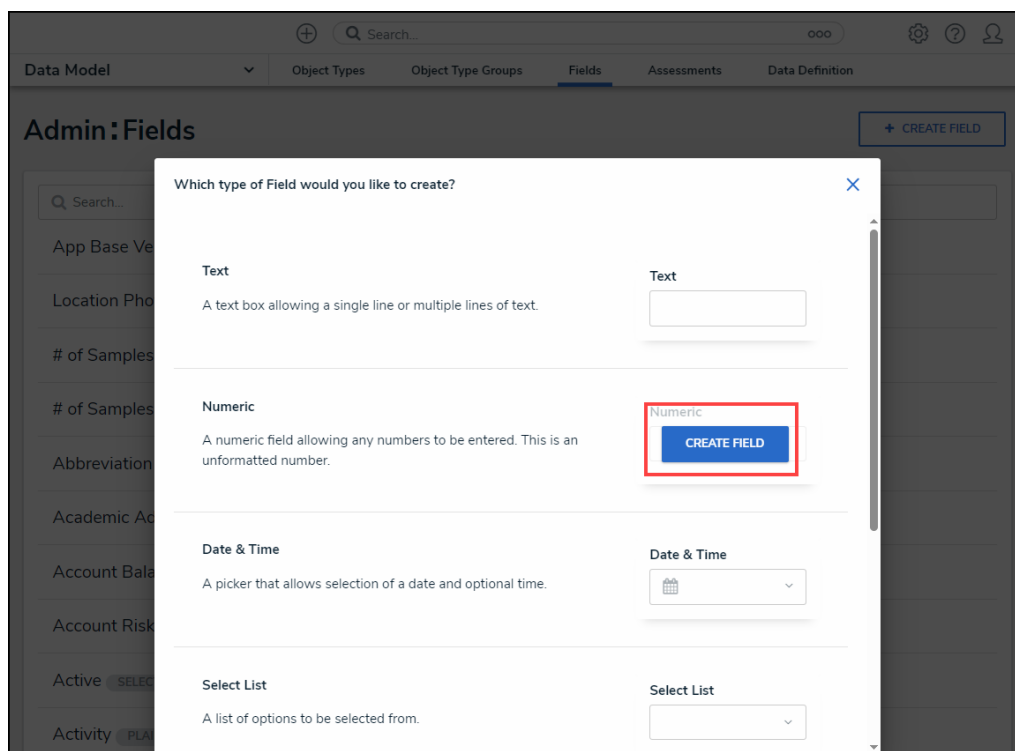
Creating a Numeric Field

- 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' interface. At the top, there's a navigation bar with tabs: 'Data Model', 'Object Types', 'Object Type Groups', 'Fields' (selected), 'Assessments', and 'Data Definition'. Below the tabs, the title 'Admin: Create a Field' is displayed. The form contains several fields: 'Field Type' (a dropdown menu currently showing 'Numeric'), '*Field Name' (a text input field containing 'CAD Currency', highlighted with a red box), 'Long Name' (a text input field with a help icon, currently empty), and 'Description' (a larger text input area, currently empty).

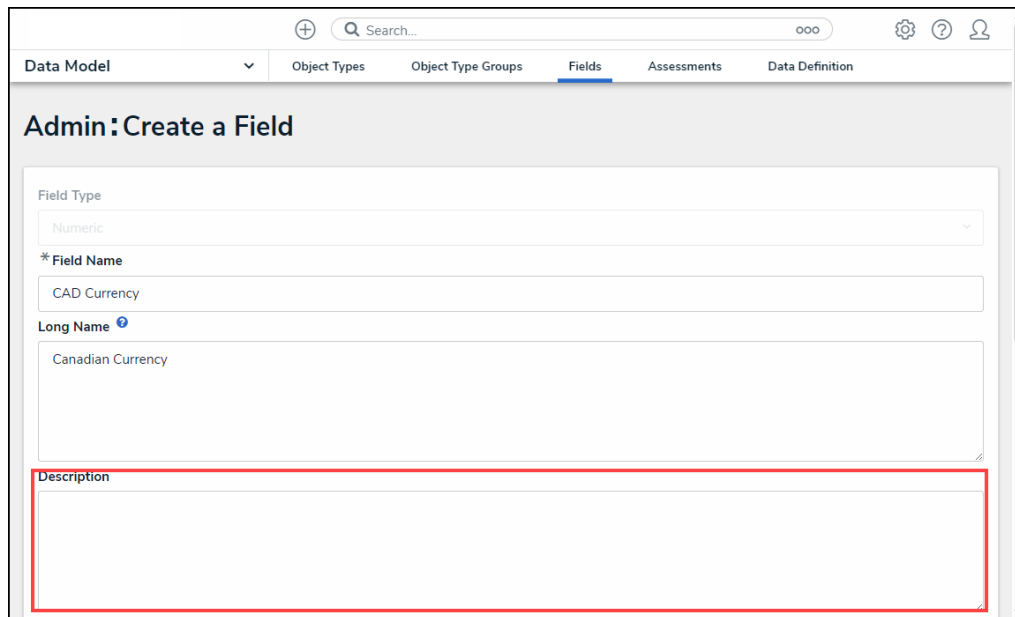
Field Name Field

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

This screenshot shows the same 'Admin: Create a Field' interface, but now the 'Long Name' field contains the text 'Canadian Currency' and is highlighted with a red box. The other fields remain the same: 'Field Type' is 'Numeric', '*Field Name' is 'CAD Currency', and 'Description' is empty.

Long Name Field

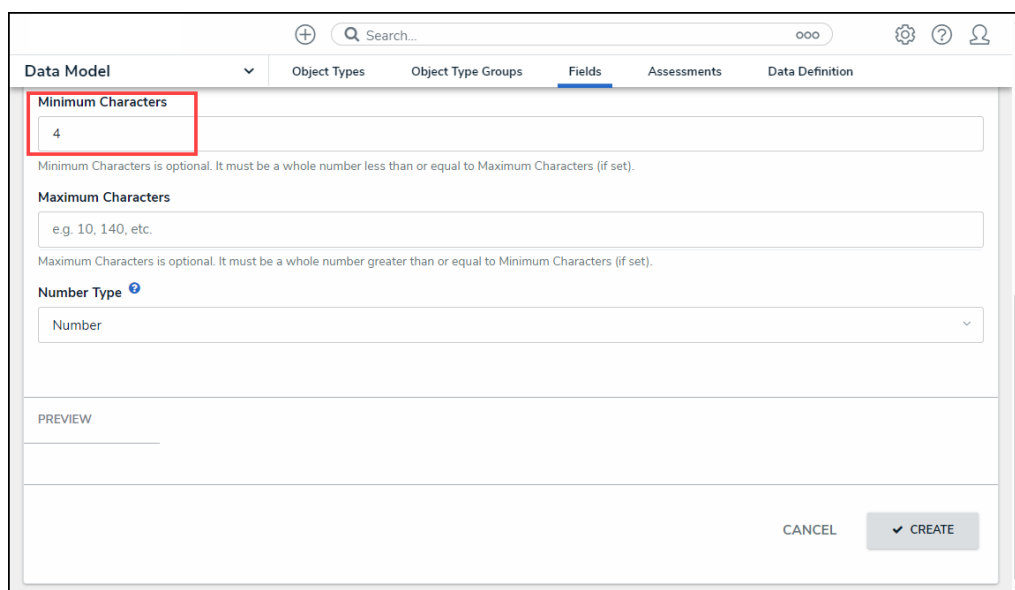
5. **(Optional)** Enter a field description explaining the function of the field in the **Description** field. The **Description** field gives users more information about a field.



The screenshot shows the 'Admin: Create a Field' interface. At the top, there's a navigation bar with tabs: 'Data Model', 'Object Types', 'Object Type Groups', 'Fields' (selected), 'Assessments', and 'Data Definition'. Below the navigation bar, the title 'Admin: Create a Field' is displayed. The form contains several fields: 'Field Type' (set to 'Numeric'), '*Field Name' (set to 'CAD Currency'), 'Long Name' (set to 'Canadian Currency'), and 'Description' (which is highlighted with a red border). There are also icons for search, settings, help, and user profile at the top right.

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' interface. The 'Minimum Characters' field is highlighted with a red border and contains the value '4'. Below it, a note states: 'Minimum Characters is optional. It must be a whole number less than or equal to Maximum Characters (if set)'. The 'Maximum Characters' field is empty, with a note below it: 'Maximum Characters is optional. It must be a whole number greater than or equal to Minimum Characters (if set)'. The 'Number Type' is set to 'Number'. At the bottom, there are 'CANCEL' and 'CREATE' buttons.

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.

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.

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.

The screenshot shows the 'Fields' tab in the Resolver interface. The 'Number Type' is set to 'Currency'. The 'Currency' dropdown menu is open, showing a list of currencies. The 'Select' option is highlighted, and the 'CAD' option is selected, with '\$ CAD' displayed in the dropdown. The list of currencies includes: Select, \$ AUD, \$ CAD, \$ HKD, \$ NZD, \$ USD, £ GBP, € EUR, ₣ CHF, ¥ CNY, and ¥ JPY.

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.

The screenshot shows the 'Admin:Editing Field' screen in the Resolver interface. The 'Field Type' is set to 'Numeric'. The 'Field Name' is 'CAD Currency'. The 'Unique Name' field is highlighted with a red box, showing 'CADCURRENC'. The 'Unique Name' field is used for 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.

Search...

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Data Model

Object Types

Object Type Groups

Fields

Assessments

Data Definition

PREVIEW

CAD Currency

Related Object Types

This Field is linked to the following Object Types:

There are no Object Types Linked to this Field

DONE

Preview Section