

# How to Create a Currency entity

## Prerequisites

We assume you have all prerequisites you may need, including:

1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to allow continue with the Action in the Guide

## Creation of Currency Entity

1. Open the **"Data"** section in the left-hand side menu. Select the **"Currency"** entity from the list under **Data**.

The screenshot displays the Finmars application interface. On the left, a sidebar menu shows the 'Data' section selected, with a red arrow pointing to the 'Currencies' option. The main area shows a table of currency entities. A red arrow points to the 'ADD CURRENCY' button at the top of the table. The table has columns for 'User code', 'Country', 'Short name', 'Name', 'Public name', and 'Notes'. The table lists various currencies, including AED, AFN, ALL, AMD, AOA, ARS, AUD, AWG, AZN, BBD, BDT, BGN, BHD, BIF, BMD, and BND.

	User code	Country	Short name	Name	Public name	Notes
<input type="checkbox"/>	-		-	-		
<input type="checkbox"/>	AED	United Arab Emirates	AED	United Arab Emirates Dirham	AED	No notes
<input type="checkbox"/>	AFN	Afghanistan	AFN	Afghan Afghani	AFN	No notes
<input type="checkbox"/>	ALL	Albania	ALL	Albanian Lek	ALL	No notes
<input type="checkbox"/>	AMD	Armenia	AMD	Armenian Dram	AMD	No notes
<input type="checkbox"/>	AOA	Angola	AOA	Angolan Kwanza	AOA	No notes
<input type="checkbox"/>	ARS	Argentina	ARS	Argentine Peso	ARS	No notes
<input type="checkbox"/>	AUD	Australia	AUD	Australian Dollar	AUD	No notes
<input type="checkbox"/>	AWG	Aruba	AWG	Aruban Florin	AWG	No notes
<input type="checkbox"/>	AZN	Azerbaijan	AZN	Azerbaijani Manat	AZN	No notes
<input type="checkbox"/>	BBD	Barbados	BBD	Barbadian Dollar	BBD	No notes
<input type="checkbox"/>	BDT	Bangladesh	BDT	Bangladeshi Taka	BDT	No notes
<input type="checkbox"/>	BGN	Bulgaria	BGN	Bulgarian Lev	BGN	No notes
<input type="checkbox"/>	BHD	Bahrain	BHD	Bahraini Dinar	BHD	No notes
<input type="checkbox"/>	BIF	Burundi	BIF	Burundian Franc	BIF	No notes
<input type="checkbox"/>	BMD	Bermuda	BMD	Bermudian Dollar	BMD	No notes
<input type="checkbox"/>	BND	Brunei Darussalam	BND	Brunei Dollar	BND	No notes

2. Click the “+ Add” button located in the top-left corner of the portfolio list view.

The screenshot shows the Finmars application interface. On the left is a sidebar with a menu including Dashboard, Reports, Data, Portfolios, Registers, Accounts, Instruments, Counterparties, Responsibilities, Currencies (highlighted), Strategies, Transactions, and Valuations. The main area displays a table of currencies. Above the table, there is a search bar and a '+ ADD FILTER' button, which is highlighted with a red arrow. Below the table, there is a prompt 'Drag a column here to group by' with a downward arrow. The table has columns: User code, Country, Short name, Name, Public name, and Notes. It lists various currencies like AED, AFN, ALL, AMD, AOA, ARS, AUD, AWG, AZN, BBD, BDT, BGN, BHD, BIF, BMD, and BND.

3. This action opens the **Add Portfolio register form**.

The screenshot shows the 'Add Currency' form. The form has a title bar 'Add Currency' and a 'Full Name' input field. Below this is a 'GENERAL' tab with fields for 'Public name', 'Country', and 'Notes'. The 'Public name' field has a 'TEXT' label. The 'Country' field has a 'Country' label. The 'Notes' field has a 'TEXT' label. At the bottom of the form are 'Cancel', 'Create', and 'Create and Exit' buttons. The 'Create and Exit' button is highlighted in red.

4. Fill in the required fields in the creation panel:
1. **Currency** – enter the full name of the currency. This typically follows the ISO 4217 format (e.g., USD, EUR, CHF).
  2. **Public name** – optional field for external-facing labels, if different from internal naming.
  3. **Country** – select the issuing country for context/reference. This may be used in filters or reports.
  4. **Notes** – add any internal notes for clarification or documentation purposes.
5. Click “**Create and Exit**” to save the portfolio and return to the list view. Alternatively, use “**Create**” to save and continue editing.

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