How to Create a Currency entity

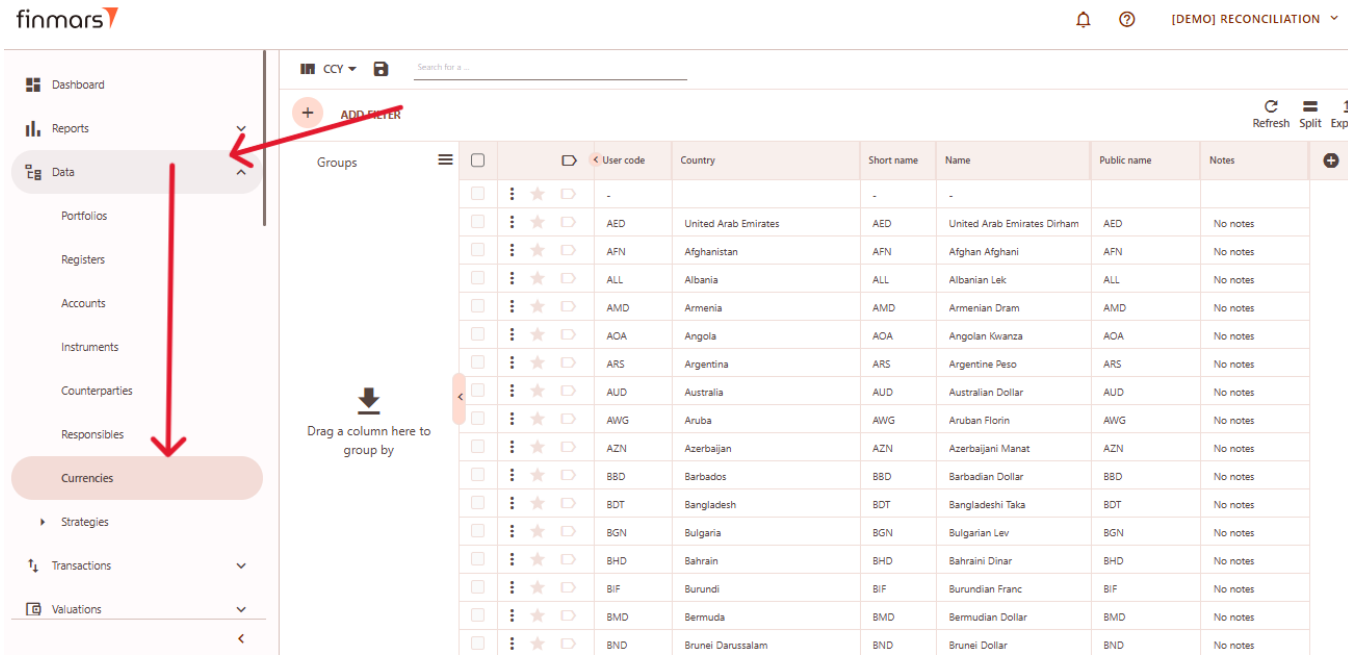
Prerequisites

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

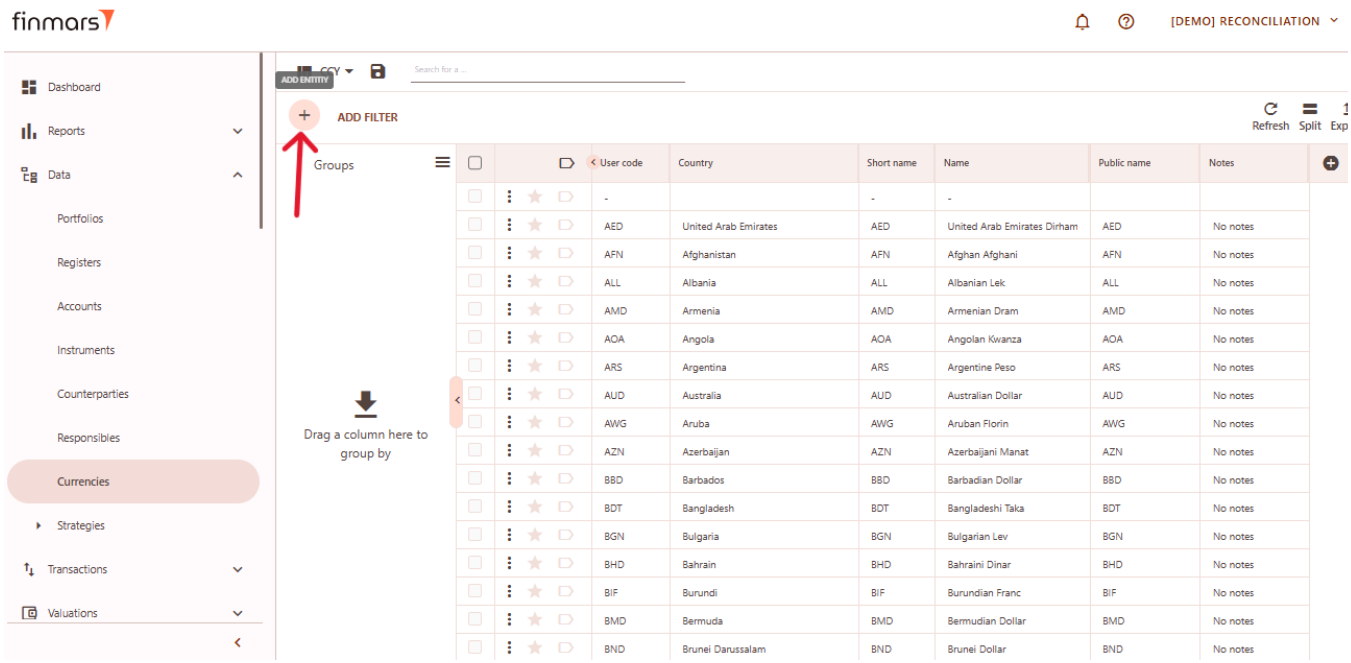
1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to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

Creation of Currency Entity

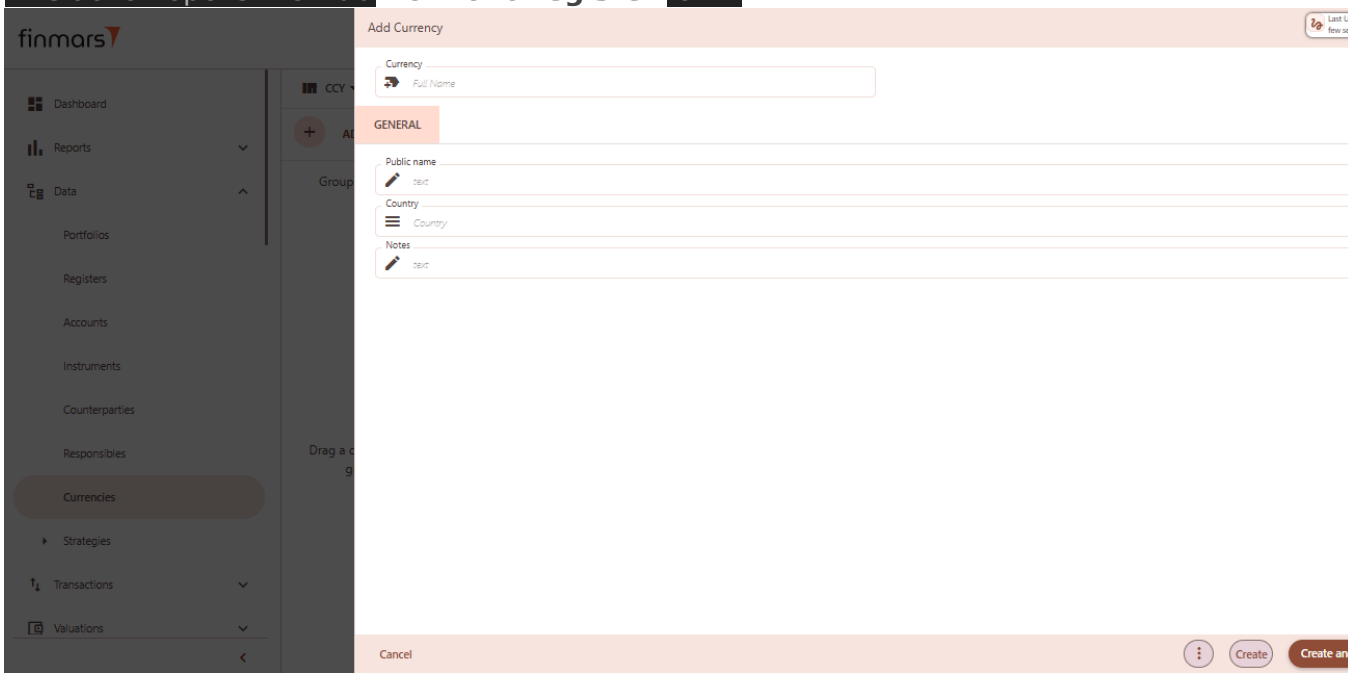
1. Open the **“Data”** section in the left-hand side menu. Select the **“Currency”** entity from the list under **Data**.



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



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



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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