

Frequent currencies

September 10, 2026

Frequent currencies

Frequent Currencies is the company list of currencies that can be made available for later

company and branch work. Add a currency here before a branch uses it.

If you need to...	Go to
Reach the list	Find Frequent currencies
Understand the list and entry fields	Understand the currency list and form
Add or change an entry	Add or edit a currency
Remove an entry or prepare an export	Delete or export currency data
Resolve a message	When currency maintenance goes wrong
Continue with company configuration	Continue with currency configuration
Open another company setting	Configuration dashboard
Continue with branch settings	Edit branch

Before you start

Sign in before maintaining an entry on this list.

When you open **Code**, the list contains the currencies available for this setting. The page is

associated with the MultiCurrency configuration feature.

Prerequisites

- Sign in before opening the Frequent currencies route.
- Confirm that your subscription includes the MultiCurrency configuration feature.
- Have the currency you need ready to choose in **Code**.
- Have the name available for review in **Name**.

The list actions depend on the access and subscription conditions in force for your configuration:

What you need to do	What must be available
Add an entry	New is available and the subscription includes the feature.
Change an entry	A pencil control is available at the end of the row.
Remove an entry	A trash-can control is available at the end of the row.
Export the list	Export is available in the configuration tools.

Find Frequent currencies

Use this route to review and maintain the company's supported currency entries.

Prerequisites

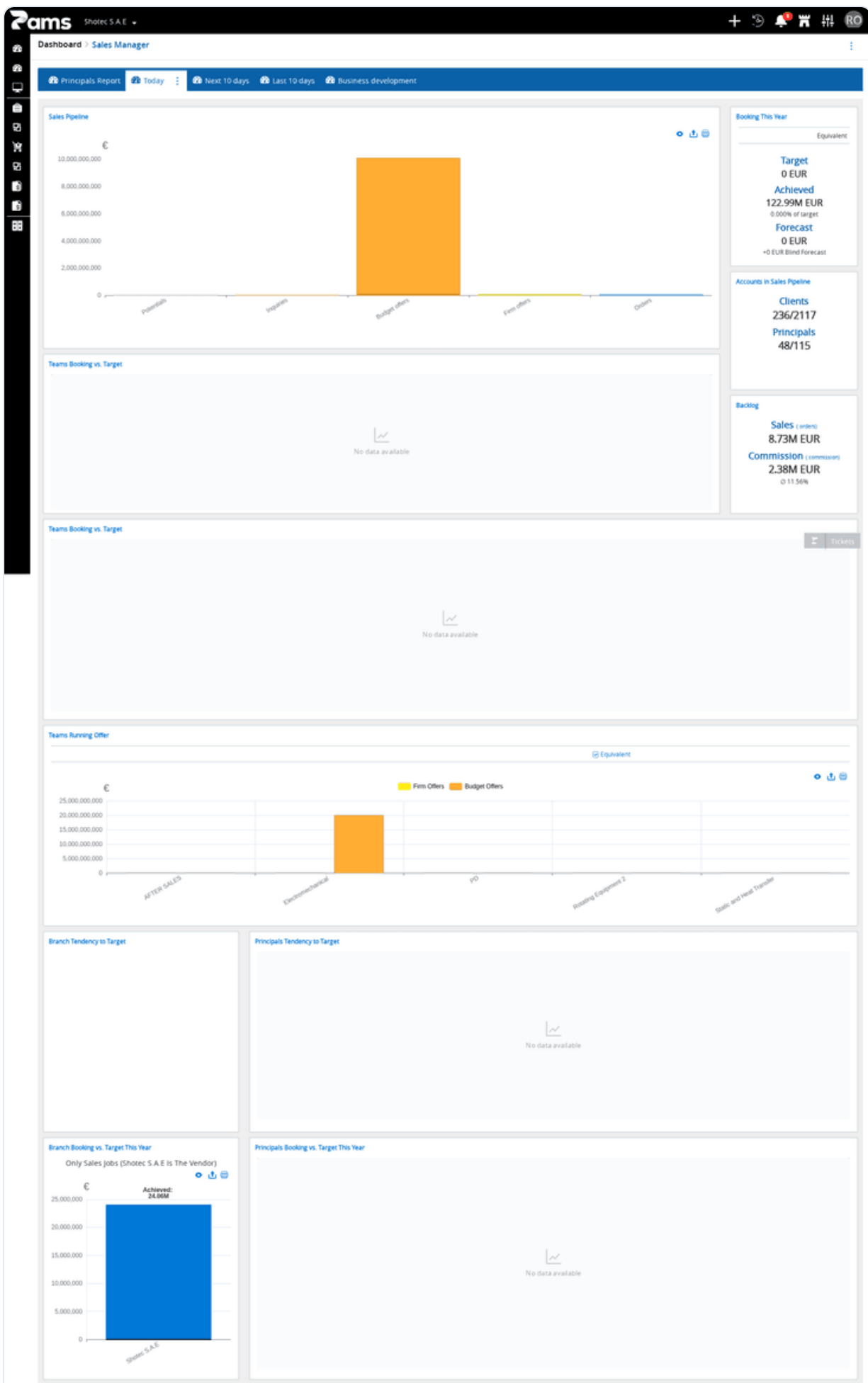
- Sign in before opening the configuration route.

Steps

1. Open the [Configuration dashboard](#).
2. Select **Frequent Currencies**.

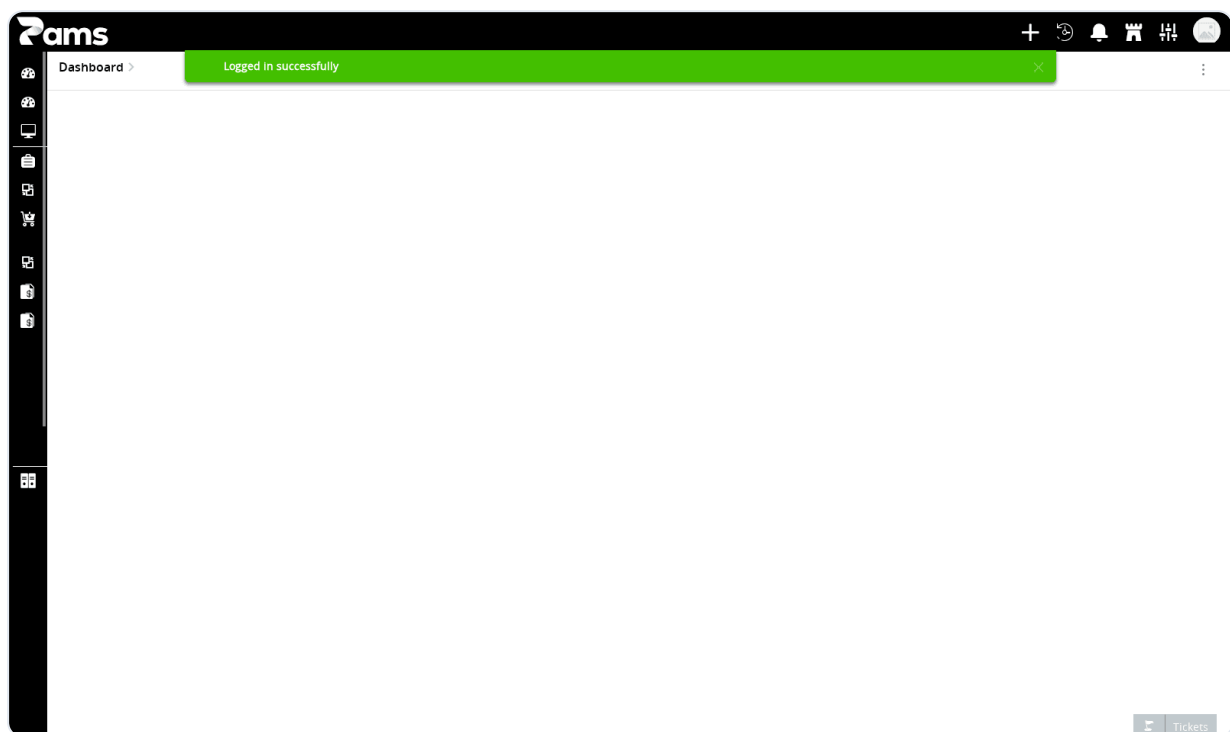
If the page opens a dashboard instead of the currency list, select **Frequent Currencies** again.

The dashboard screen has no currency columns.





Result: The Frequent Currencies list is on screen with its available list actions.



Understand the currency list and form

The list shows the currency entries available to the company. When you open a new or existing entry, the form shows the fields used to maintain it.

List columns and entry fields

Area	Name	Use
List and form	Code	Choose the currency code. This field is required.
List and form	Name	Review or enter the currency name. This field is required.
List only	Symbol	Read the currency symbol in the list.
Saved data	Company currency identifier, company identifier, and display order	These values support the saved entry and list ordering.

The form displays the fields provided for entry maintenance. In **Code**, choose from the available currencies; the selected code can be paired with its name.

Actions on the screen

Action	Where to find it	What it does
New	Above the list	Opens a new-entry form.
Pencil control	At the end of a row	Opens the selected entry for editing.
Trash-can control	At the end of a row	Opens the row's delete choices.
Export	In the configuration tools	Opens the export choices.

The list can show an upgrade page instead of the currency list when the required subscription is not included. The form's fields and list columns depend on the settings used

for your company, so work from the headers and labels that are actually on your screen.

Add or edit a currency

Adding a currency creates a company entry; editing changes the selected entry's currency details.

Choose the route that matches the work you need to do.

Prerequisites

- Open the Frequent Currencies list.
- Have the required **Code** and **Name** information ready.
- Use this procedure only when the corresponding action is available.

If you need to...	Start with
Add a new company currency	Select New above the list.
Change a saved currency	Select the pencil control at the end of its row.

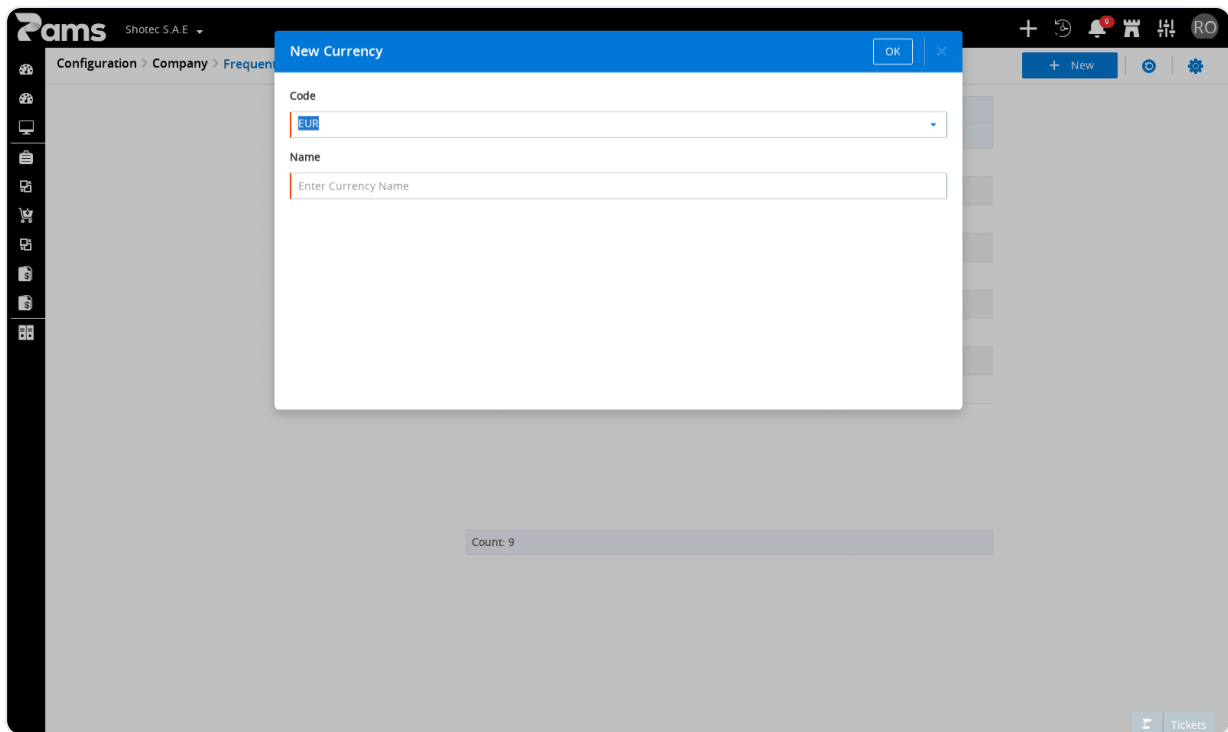
Steps

1. Select the applicable action in the table.
2. In **Code**, choose the currency code.
3. Review **Name**.
4. Select **OK** to submit the entry.

For a new entry, the form starts with a new item. For an existing entry, the form loads the values

from the selected row. A successful new entry reports `Data saved Successfully` ; a successful edit

reports `Data updated Successfully` .



Result: The currency entry is submitted and the list refreshes with the saved or updated entry.

Delete or export currency data

Deletion removes a saved currency entry; export prepares the list for an output format. These are separate list actions, so choose the path that matches your purpose.

Prerequisites

- Open the Frequent Currencies list.
- Select a saved row for deletion, or confirm that **Export** is available for the list.

Steps

1. Select the action for your goal in the table:

If you need to...	Action
Remove a saved currency	Select the trash-can control at the end of the row.
Prepare a list export	Select Export in the configuration tools.

2. If you selected the trash-can control, read `Are you sure you want to delete this item?` .

3. If the delete menu is open, select **Delete**.
4. If you opened the export choices, select **Cancel** to close them without continuing.

Deleting reports **Data Deleted Successfully** when it completes. A related saved record reports

Related to Saved data, Can't be deleted , and another deletion failure reports **Failed to Delete** .

Result: The export choices are closed, or the deletion path has reached its confirmation or completion message.

When currency maintenance goes wrong

Use the message on screen to choose the corrective action. The message identifies whether the problem is an incomplete entry, an invalid value, a duplicate, or a blocked list action.

Message	What to do
Code is required	Return to Code and choose a currency code.
Name is required	Return to Name and enter the currency name.
Just '_' '-' And '.' Characters Accepted	Remove characters outside the accepted set from the value being validated.
Data saved Successfully	The new entry was saved. Continue reviewing the list.
Data updated Successfully	The edited entry was updated. Continue reviewing the list.
Data Deleted Successfully	The deletion completed. Continue reviewing the list.
Related to Saved data, Can't be deleted	Keep the entry and review the saved data that depends on it.
Failed to Delete	Do not repeat the deletion blindly; review the row and access before trying again.
Must have at least one item	Keep at least one currency entry in the list.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters from the filter value and apply the filter again.

Result: You have a message-specific correction for the currency action that stopped.

Continue with currency configuration

After you maintain an entry, continue with the company or branch configuration task that needs that currency.

The business use is direct: before a branch uses a newly supported currency, add it to Frequent

Currencies. For branch-specific settings, continue to [Edit branch](#).

For another company setting, return to the [Configuration dashboard](#).

Result: The supported currency is available for the next configuration task.