Frequent Currencies

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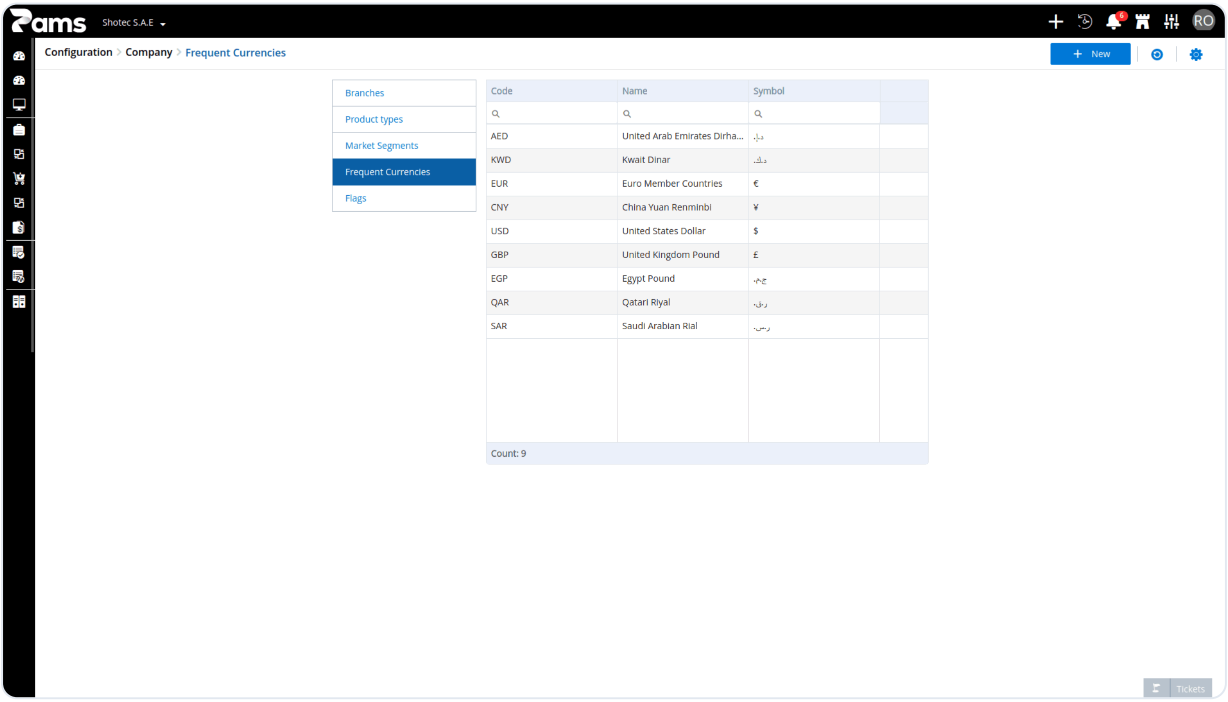
Frequent Currencies

Applications › Configurations › Company



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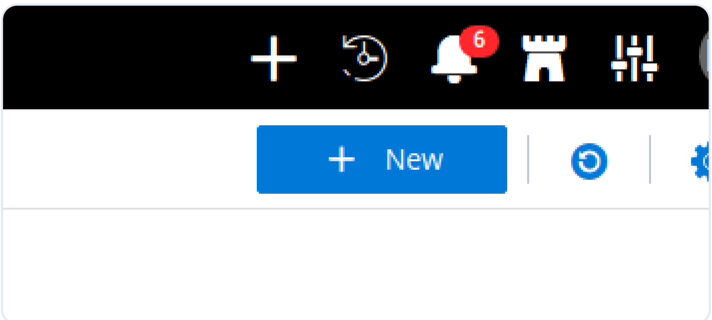


Overview

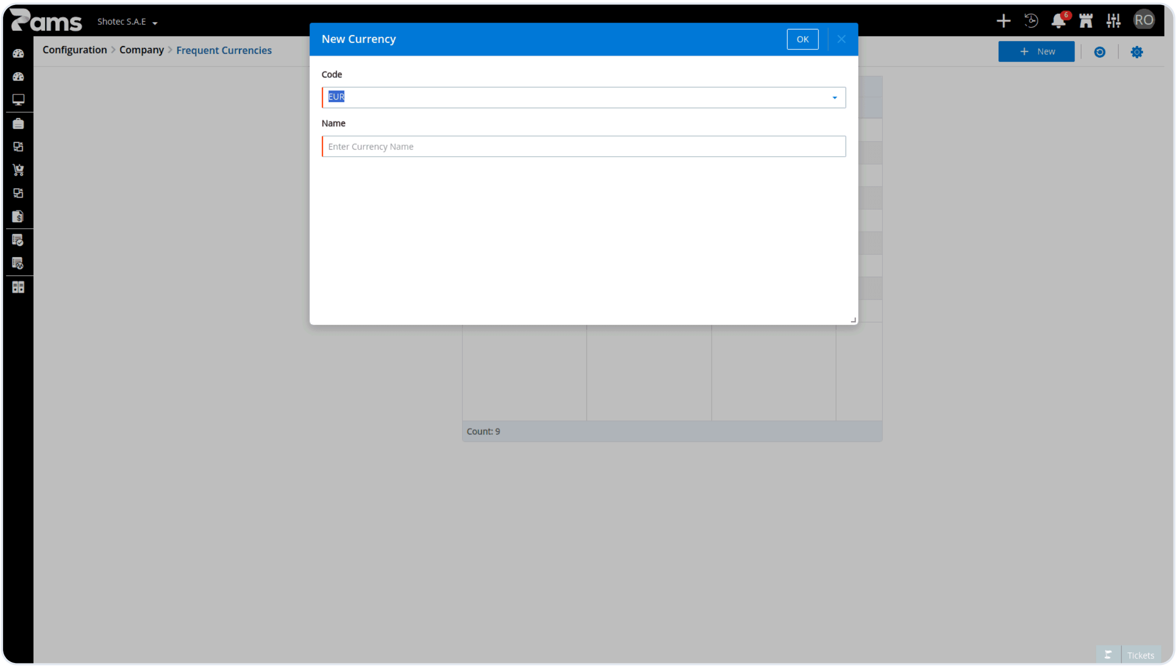
Frequent Currencies provides a company-level list of currencies commonly used in business operations. Sales representatives, purchasing officers, finance officers, accountants, and project managers can use this list to identify currency codes, names, and symbols when reviewing commercial and financial information. Use this page when you need to find a frequently used currency, refresh the displayed list, or export the available currency information.

The list displays currency records with the columns **Code**, **Name**, and **Symbol**. No record status or approval lifecycle is shown on this screen.

Settings

Open the currency list from **Configurations** > **Company** > **Frequent Currencies**. The page includes a Settings control that may be used to access available list settings.

1. Open **Frequent Currencies** from **Configurations** > **Company** > **Frequent Currencies**.



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2. Select **Settings (icn icn-settings)** when you need to review the available settings for this list.

   The captured screen does not display the settings fields or options. Review the options shown after opening Settings before making changes.

> **Note:** Only change list settings when you understand their effect on the currency list. The screen does not show any currency-specific configuration fields.

Workflow

Find the required currency

Use the list when you need to identify a currency by its code, name, or displayed symbol.

1. Review the **Code**, **Name**, and **Symbol** columns to locate the required currency record.
2. If the required record is not immediately visible, enter search text in **Search**. Use a relevant value, such as a currency code or part of a currency name.
3. Select **Apply filter** to apply the current search or filter selection.

   The list remains your working view for reviewing frequent currencies. Because no record status is shown, applying a filter does not move a currency through a lifecycle; it only narrows the displayed results.

> **Tip:** Search by the short currency code when you know it. Codes are generally faster to compare than full currency names in a long list.

Decide whether to revise the displayed list

When you need the most current displayed information, refresh the list before relying on it for operational or financial review.

1. Select **Refresh (icn-update)** to update the displayed list.
2. Review the refreshed records using the **Code**, **Name**, and **Symbol** columns.
3. If you no longer want to apply the current filter operation, select **Cancel**.

   No separate confirmation, approval, or posting action is available on this screen.

Decide whether a new currency record is needed

When a required currency is not available in the frequent-currency list, start a new record from this page.

1. Select **New**.

2. Complete the fields presented in the new-record view, if available.

   The captured Frequent Currencies screen does not provide the fields or save action for the new-record view. Therefore, this page cannot confirm which values are required or how the record is saved.

3. Return to the Frequent Currencies list and use **Search** and **Apply filter** to verify that the required currency is available.

> **Warning:** Do not assume that selecting **New** immediately creates a currency. The screen only confirms that it opens the new-record action; the record fields and completion controls are not shown.

Export the currency list

Export the displayed list when you need to share or review the currently available frequent-currency information outside the application.

1. Apply any required search or filter using **Search** and **Apply filter**.
2. Select **Export**.
3. Use the exported output to review the currency **Code**, **Name**, and **Symbol** values included in the current list view.

Export does not change the currency records. It provides an output of the list for review or further business use.

Examples

A purchasing officer is preparing an RFQ and needs to confirm the code and symbol for Kuwaiti Dinar before using the currency in related commercial information.

1. Open **Frequent Currencies** from **Configurations** > **Company** > **Frequent Currencies**.
2. Enter `KWD` in **Search**.
3. Select **Apply filter**.
4. Review the resulting currency record. Confirm that the **Code** is `KWD`, then review the corresponding **Name** and **Symbol** shown in the list.
5. If the purchasing officer needs to provide the currency information to a colleague, select **Export** after confirming the filtered result.

6. If the result does not appear, select **Refresh (icn-update)** and repeat the search. If it is still unavailable, select **New** to begin adding a record, subject to the fields and completion options available in the new-record view.

This process gives the purchasing officer a checked currency reference before continuing work on the RFQ or related buyout activity.

Tips

> **Tip:** Apply a filter before exporting when you only need a small set of currencies. This keeps the export focused on the records you are reviewing.

> **Note:** The **Symbol** column is useful when reviewing customer-facing, supplier-facing, or finance-related documents, while the **Code** column provides a concise identifier for searching.

> **Warning:** The Frequent Currencies screen does not show exchange rates, status values, or an approval process. Do not use this list alone to infer exchange-rate or financial-posting information.

Troubleshooting

Symptom	Likely cause	Fix
The required currency is not visible.	The list may not be filtered correctly, or the displayed information may need refreshing.	Enter a code or name in **Search**, select **Apply filter**, and then select **Refresh (icn-update)** if necessary.
The list shows too many records to review efficiently.	No search or filter has been applied.	Enter a relevant currency code or name in **Search**, then select **Apply filter**.
The filtered result is no longer needed.	A search or filter operation is still active.	Select **Cancel** and review the list again.
A required currency cannot be found after searching and refreshing.	The currency may not be present in the frequent-currency list.	Select **New** to start a new record. Complete only the fields and actions shown in the new-record view.

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