## Installing packages and customizing

- 1. Install packages from the Marketplace
- 2. Go to the Lookups "NBU" folder. Open the lookup "Currency"

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Q Search app	< Lookups							
NBU exchange rates	→ NEW FOLDER → NEW I	LOOKUP ACTIONS -						VIEW -
Lookups	File managemer	nt ×	© Filters/folders → NBU × Currencies					
System settings	Integrations Invoices		OPEN CONTENT OPEN PROPERTIE	ES DELETE				
Process library	Knowledge base Leads	2	Notification from update currency NBU	ą				
Activities	Machine Learnin	ng 🔯						
Tasks	Deportunities							
III Creatio 🕨 +	Q Search				હે	::	<b>4</b> 0	۰ 🗠
Q Search app	Lookups							1
Studio 🗸								VIEW *
1 Home	한 Filters/folders							
Process library	Name Egyptian pound	Code 818	Short name EGP	Symbol EGP				
Process log	Indian rupee	356	INR	INR				
Web services	Ruble	643	RUB	rub.				
🔏 Webhooks	Australian Dollar US Dollar	036 840	AUD	aud \$				
Lookups	Euro	978	EUR	¢				
🚹 Users	Hryvnia	980	UAH	hm.				
System settings								
🕑 UI Management								
Message templates								
🚯 ML models								

3. Add a list of required currencies to the lookup "Currency". This list will be used to select currencies for synchronizing exchange rates with the NBU.

Important! The values in the "Short name of currency", "Code" and "Symbol" columns must be filled in

4. Open the lookup "NBU exchange rate synchronization settings".

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Q Search app <	Lookups							
NBU exchange rates 🛛 🗸	NEW CLOSE ACTIONS -						VIEW	-
🛃 Lookups	GDD exchange rate synchronization settings							
System settings	Currency to sync Singapore Dollar	Short currency name SGD						—
Process library	Euro	EUR						
Activities	US Dollar	USD						
F Activities	Danish Krone	DKK						
F Tasks								

5. Add currencies for which you want to synchronize with the NBU exchange rate to the "NBU exchange rate synchronization settings" lookup.

The currencies added to the lookup "Currency" in Step 3 are available for selection.

6. Go to the Process library section. Run the business process "Update currency rate (NBU)"



\* It is also possible to set up the "Update currency rate (NBU)" unit to start with a timer.

7. Return to the Lookups section. Open the lookup "Exchange rate".

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Q Search app <	Lookups		2
Studio -	NEW CURRENCY RATE CLOSE ACTIONS ~ Exchange rate		VIEW *
A Home	€] Filters/folders → Start → End	Currency	Exchange rate
Process library	12/6/2024	Egyptian pound	0.83230000
Process log	12/6/2024	Euro	43.81460000
Web services	12/6/2024	Indian rupee	0.49092000
	12/6/2024	Australian Dollar	26.76380000
& Webhooks	12/6/2024	US Dollar	41.59750000
Lookups			
Users			
System settings			
📴 UI Management			
Message templates			
😝 ML models			

The current NBU rate for the currencies added in <u>Step 5</u> is displayed.

## Important!

The peculiarity of the NBU service is that the current date request works like this:

- a request for the current date before 15:30 returns the current day's exchange rate and date;
- after 15:30, the next day's date and the current rate after signing.
- 8. Open NBU exchange rates by previous requests lookup

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All ap	ps		•	NEW FOLDER - NEW LOOKUP	ACTIONS -			
	🗟 Lookups				×	🔁 Filters/folders 🗕 📔 NBU ×		
🛃 L				- All		NBU exchange rates of past requests		
				Accounts		OPEN CONTENT OPEN PROPERTIES DELETE		
	vessage tem	iplate	5	Activities		Currencies		
	🚯 ML models			Calendars		Exchange rate		
69 N				Contacts		Notification from update currency NBU		

All exchange rates are displayed according to the date and time of their update

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Q Search app <	Lookups								
All apps 🚽	NEW CLOSE ACTIONS -							VIEW	•
Opportunity	NBU exchange rates of past requests								
🗿 Leads	La Findeshowers + Day of the last update	Exchange rate	Currency 🔨						_
房 Lookups	2/4/2025 10:00 PM	25.93870000	Australian Dollar						_
B Moscogo tomplatos	2/5/2025 12:00 AM	25.93870000	Australian Dollar						
Message templates	2/4/2025 12:00 AM	25.70970000	Australian Dollar						
🚯 ML models	2/4/2025 10:00 PM	43.11700000	Euro						
Popportunities	2/4/2025 10:00 PM	5.36180000	Hong Kong Dollar		╡				
Order and Contract	2/5/2025 12:00 AM	5.36180000	Hong Kong Dollar						
	2/3/2025 10:00 PM	0.27038000	Japanese Yen						
g olders	2/5/2025 12:00 AM	0.26891000	Japanese Yen						
相 Playbooks	2/4/2025 10:00 PM	0.26891000	lapanese Yen						

## Set up activity creation and notifications

1. Open the System messages section

III Creatio 🕨 +	Q Search			۵ ::	<b>.</b>	?	٥	
Q Search app <	System settings							
NBU exchange rates 🚽	NEW FOLDER - ADD SETTING ACTIONS -						VIEW	•
🛃 Lookups	- 🛧 Favorites ×	♀ Name Contains Send notification for _ × Name	Code					
System settings	<ul> <li>All</li> <li>2FA</li> <li>Accessibility</li> </ul>	Send notification for update currency NBU OPEN COPY DELETE	BtcSendNotificationForUpdateCurr	rencyNBU				
Process library	+ Administration							

2. In the Send notification for update currency NBU system setting, activate the Default value checkbox. Save

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Q Search app		Send notification for update currency NBU								1
NBU exchange rates		CLOSE								
房 Lookups		Name* Send notification for update currency NBU	Code* BtcSendNotificationFort	JpdateCurrencyNBL	U					
3 System settings		Default value	Save value for current user							

3. Go to the Lookups section. Open the Notification from update currency NBU lookup

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Q Search app <	Lookups	
NBU exchange rates 🛛 🗸	NEW FOLDER - NEW LOOKUP	VIEW -
	Emeritar	🔁 Filters/folders 🛩 📙 NBU X
Lookups		Currencies
	Accounts	Exchange rate
System settings	Activities	Notification from update currency NBU
	Calendars	OPEN CONTENT OPEN PROPERTIES DELETE
Process library	Contacts	NBU exchange rate synchronization settings
A sali datas	Content security	
Activities	Contracts	

- 4. Add user(s). You can add both individual users and roles.
- 5. In the Actual and Activity create columns, select the checkboxes

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Q Search app <	Lookups								- 1
All apps -	NEW CLOSE ACTIONS - Notification from update currency NBU							VIEW	-
	yActivity_create	Actual Yes	User Supervisor2						
Message templates	Yes	Yes	Sales Department. Head Office						

If the Current and Create activity columns are checked, a Task is created for the user. The user receives a notification in the sidebar

If you select a <u>role in step 4</u>, all users with the corresponding role will receive the notification.

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Q Search app <	Tasks			+ New	System messages	×°
NBU exchange rates 🛛 🚽	■ Folders  ■ 1/30/2025 till 1/30/2025 ×  L Supervisor3 ×	Show canceled tasks		Σ Summaries 👻 😂	Today at 6:03 PM Tasks	
🗟 Lookups	O Only my tasks ♥ Tag Q Search	Category	Owner	Start + :	Update currency NBU	
System settings	1 Update currency NBU	To do	Supervisor3	1/30/2025 6:03 PN	Today at 3:52 PM Tasks	
Process library	2 Update currency NBU	To do	Supervisor3	1/30/2025 5:32 PN	opuate currency NBO	
Activities	4 Update currency NBU	To do	Supervisor3	1/30/2025 5:22 PM		
	5 Set AspNetCompatibilityEnabled true	To do	Supervisor3	1/30/2025 5:09 PN		
F Tasks	6 Set AspNetCompatibilityEnabled true	To do	Supervisor3	1/30/2025 5:08 PN		

If the Current column is checked "yes" and the Create activity column is checked "no", the task is not created. A user receives a reminder to update courses in the bell

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Q Search app <	Tasks				+ New	Reminders	×°
NBU exchange rates 🔹	🖿 Folders 📋 1/30/2025 till 1/30/2025 × 💄 Employee 🦉 Show	w canceled tasks O Only my tasks	Tag	-		Postpone all 👻 Cancel all	
🛃 Lookups	Q Search			2	summaries V	Today at 6:03 PM,	· •
System settings	Subject     Update currency NBU	Category To do	Owner Supervisor3	Start ¥ 1/30/2025 6:03 PM	End + : 1/30/2025 6:03 PM	Today at 5:32 PM	
Discoss library	2 Update currency NBU	To do	Supervisor3	1/30/2025 5:32 PM	1/30/2025 5:32 PM	Update currency NBU	
Process library	3 Update currency NBU	To do	Supervisor3	1/30/2025 5:22 PM	1/30/2025 5:22 PM	Today at 5:22 PM,	-
F Activities	4 Update currency NBU	To do	Supervisor3	1/30/2025 5:18 PM	1/30/2025 5:18 PM	Update currency NBU	
📕 Tasks	6 Set AspNetCompatibilityEnabled true	To do	Supervisor3	1/30/2025 5:08 PM	1/30/2025 5:08 PM	Today at 5:18 PM,	•
Assounts	7 Set AspNetCompatibilityEnabled true	To do	Supervisor3	1/30/2025 5:06 PM	1/30/2025 5:06 PM	Update currency NBU	
Accounts	8 Update currency NBU	To do	Supervisor3	1/30/2025 5:04 PM	1/30/2025 5:04 PM	Today at 5:09 PM,	