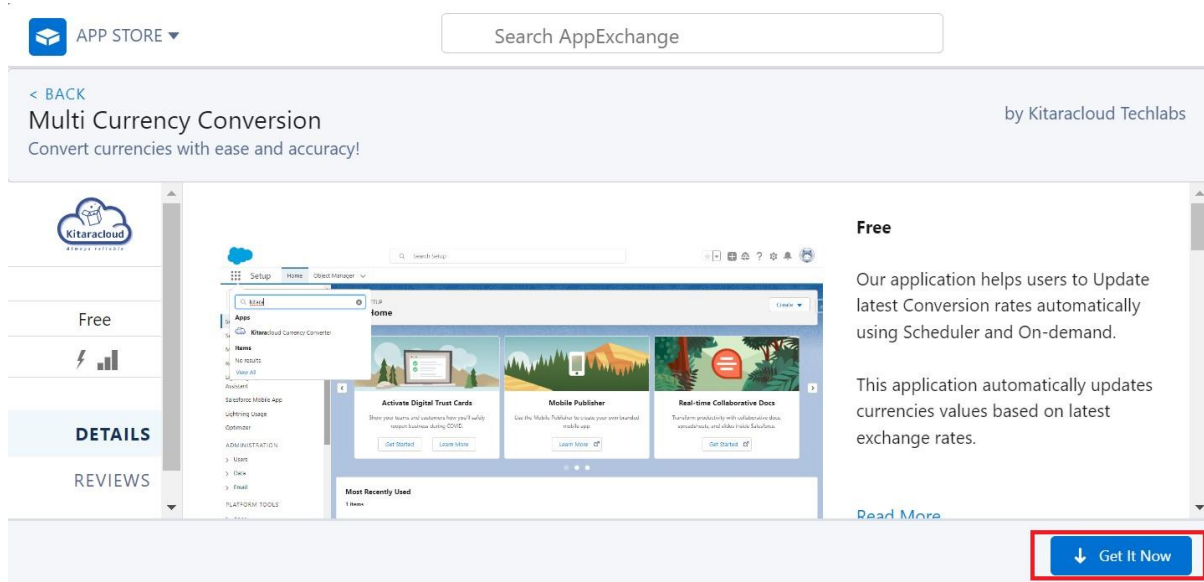
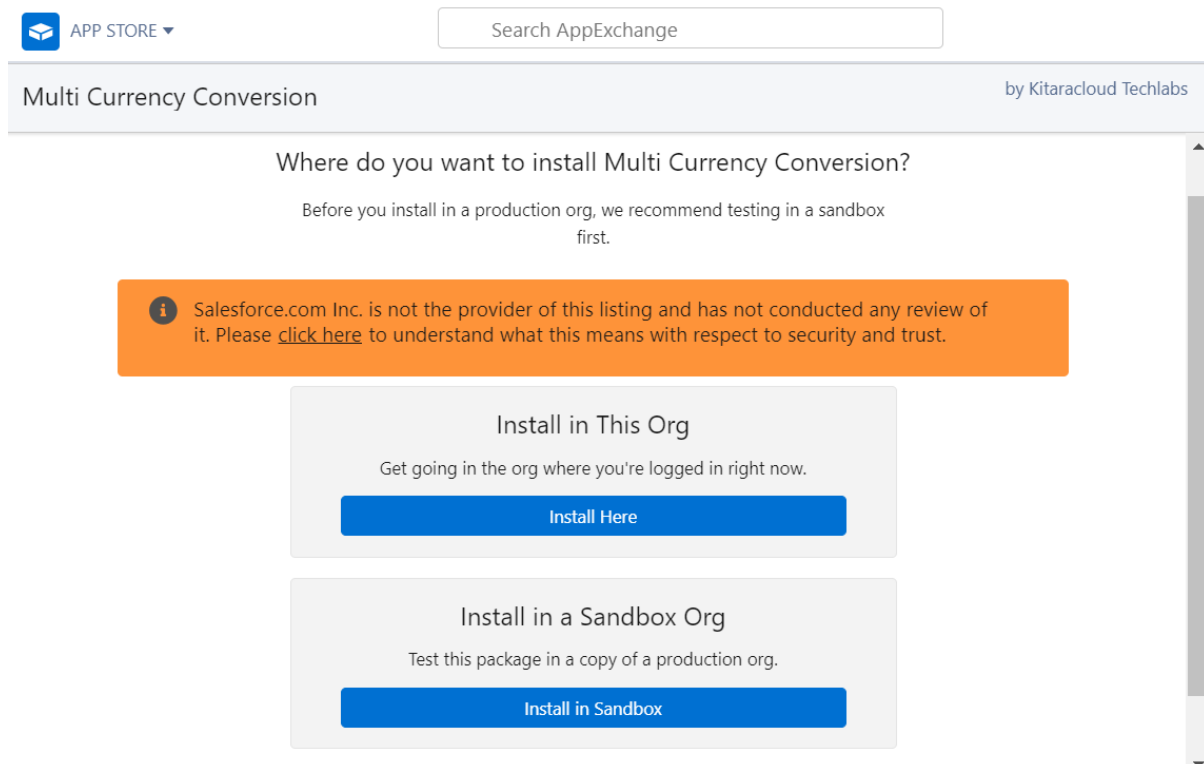


Install and Initial Setup

1. Click **Get it Now** on the [AppExchange listing](#)



2. Choose your production or sandbox environment, then click on the "Install in Production" or "Install in Sandbox" option.



3. Select the option that suits your requirements and proceed by clicking on **Install**.

 APP STORE ▾

Search AppExchange

**Install Currency_ConversionV1**
By Kitaracloud Techlabs


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

Install

Cancel

App Name	Publisher	Version Name	Version Number
Currency_ConversionV1	Kitaracloud Techlabs	Currency Conv 0.9	0.9

Description
Update Conversion rate

Additional Details [View Components](#)

4. Grant third-party access to the apilayer API and then click on Continue.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.apilayer.com	☒

☒

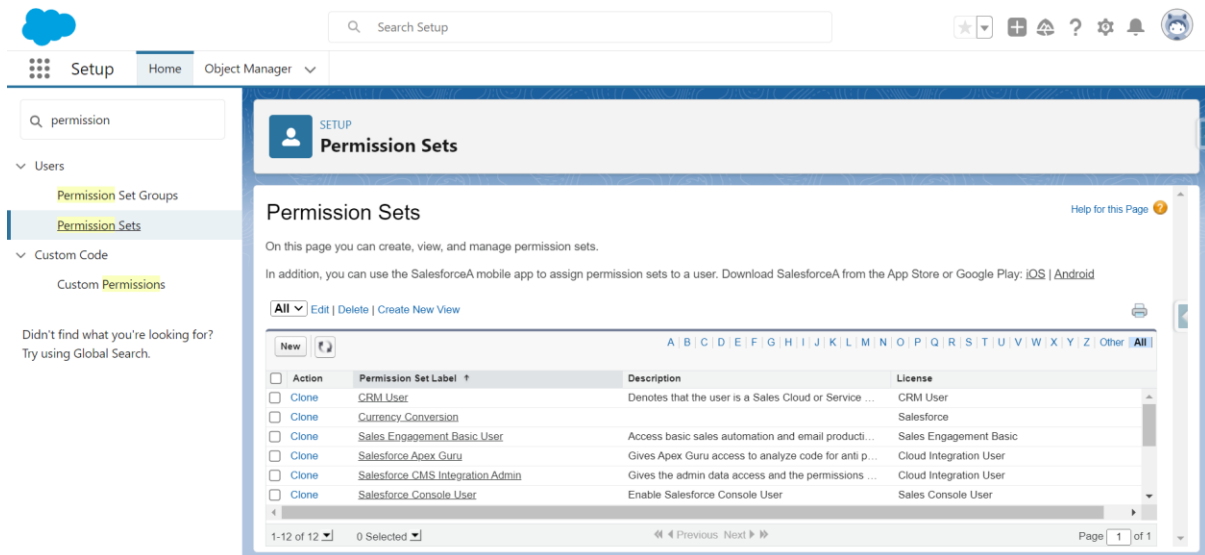
Yes, grant access to these third-party web sites

Continue

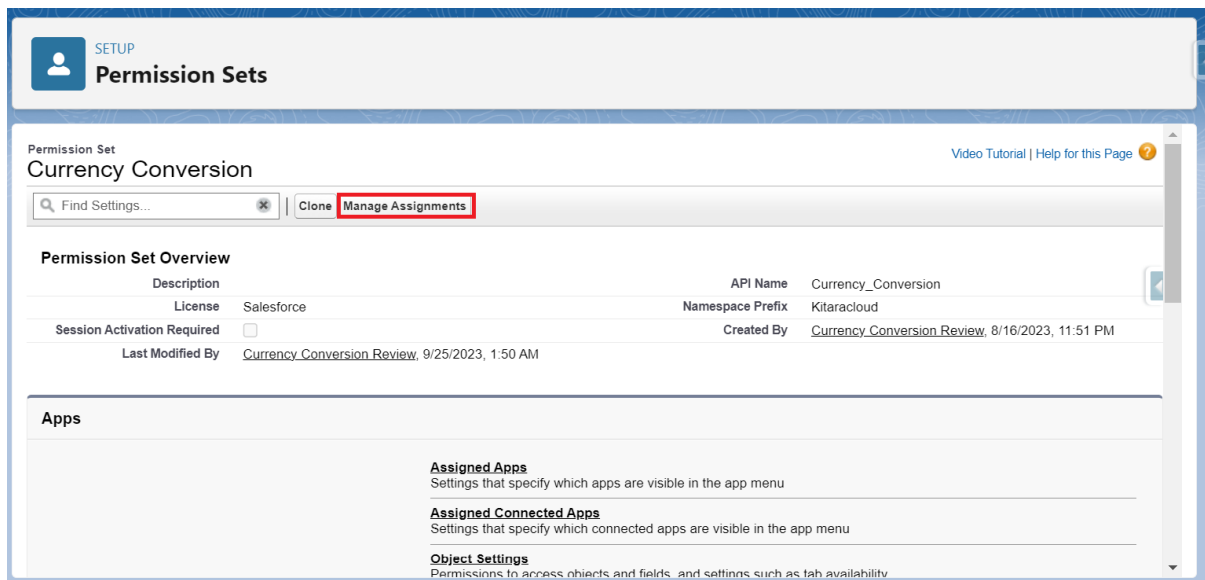
Cancel

Assigning Permission Set to the User

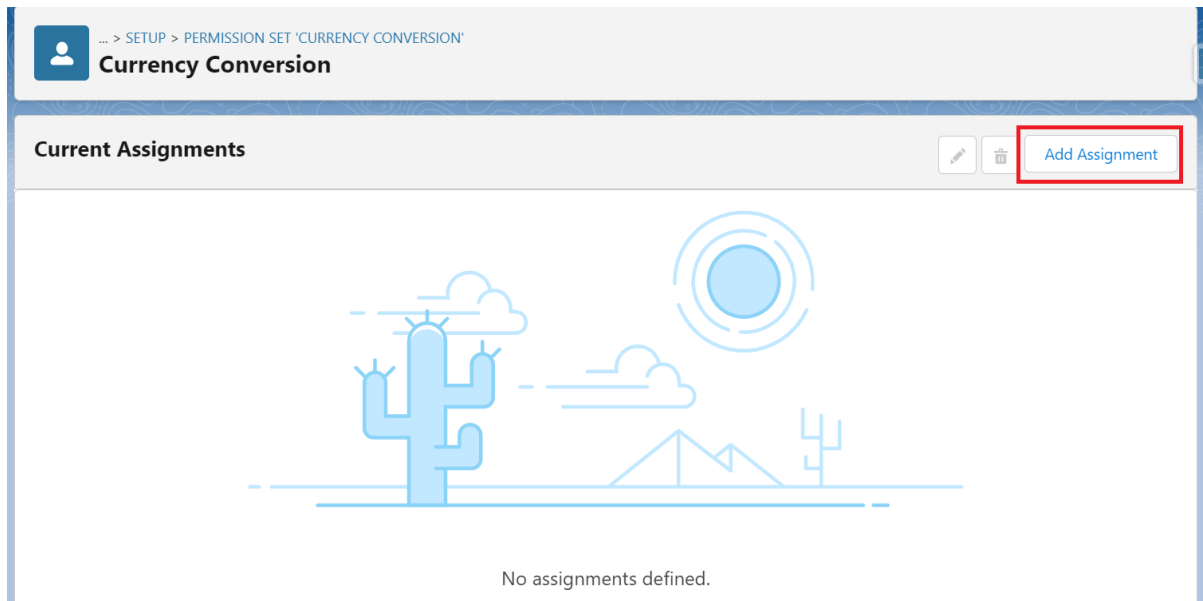
1. After Package installation, we will assign the necessary permission set.



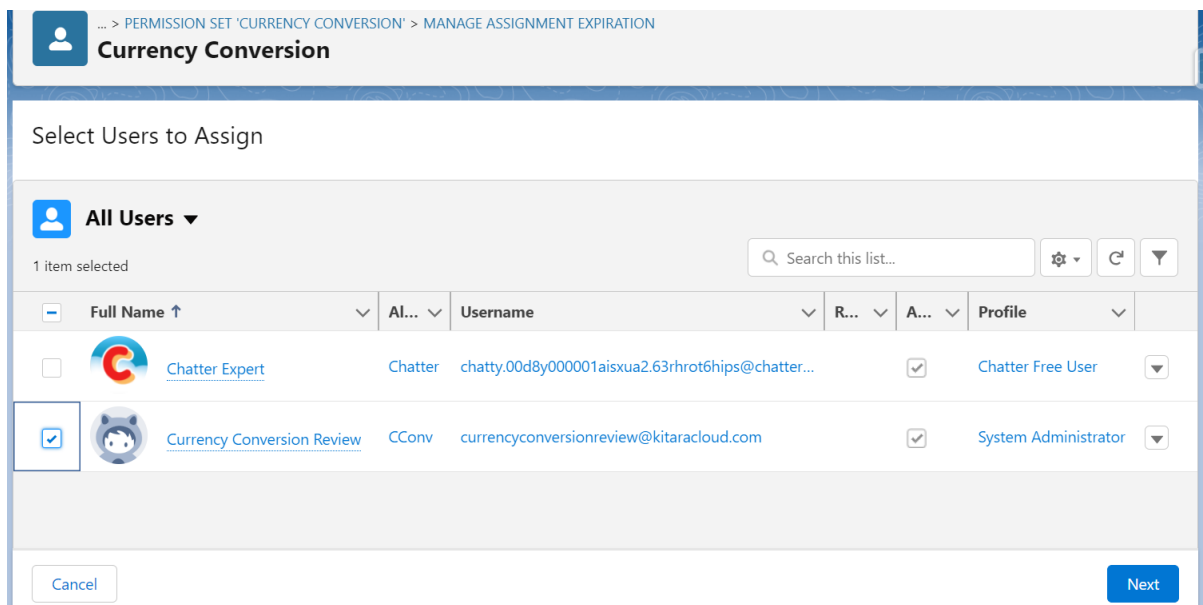
2. Choose the Currency Conversion permission set and then click on "Manage Assignments"



3. Click on “Add Assignment”.



4. Choose the user and proceed by clicking Next.



5. Click "Assign" to assign the permission to the user.

 **Currency Conversion**

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day1 Week30 Days60 DaysCustom Date

ⓘ Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Currency Conversion R...		System Administrator	✓	Salesforce	Never Expires

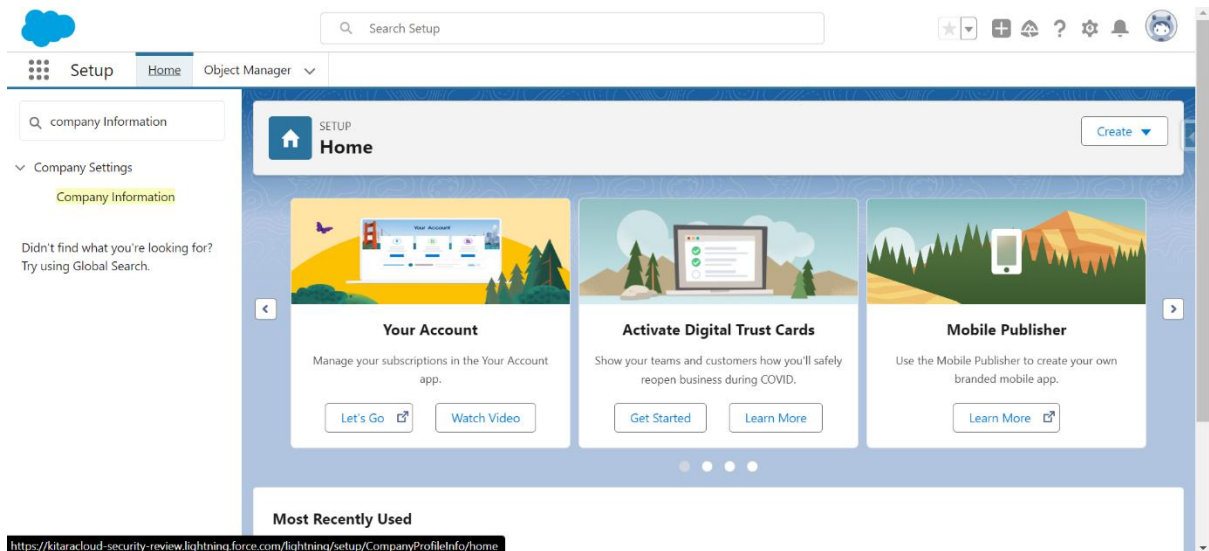
Cancel

Back

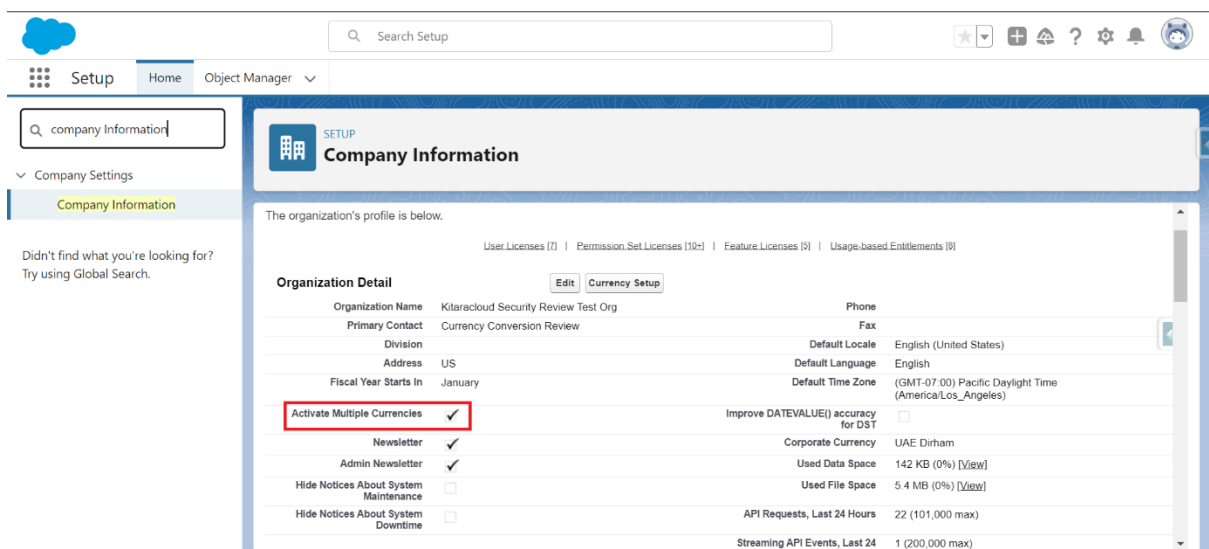
Assign

Enable Advance Currency Management

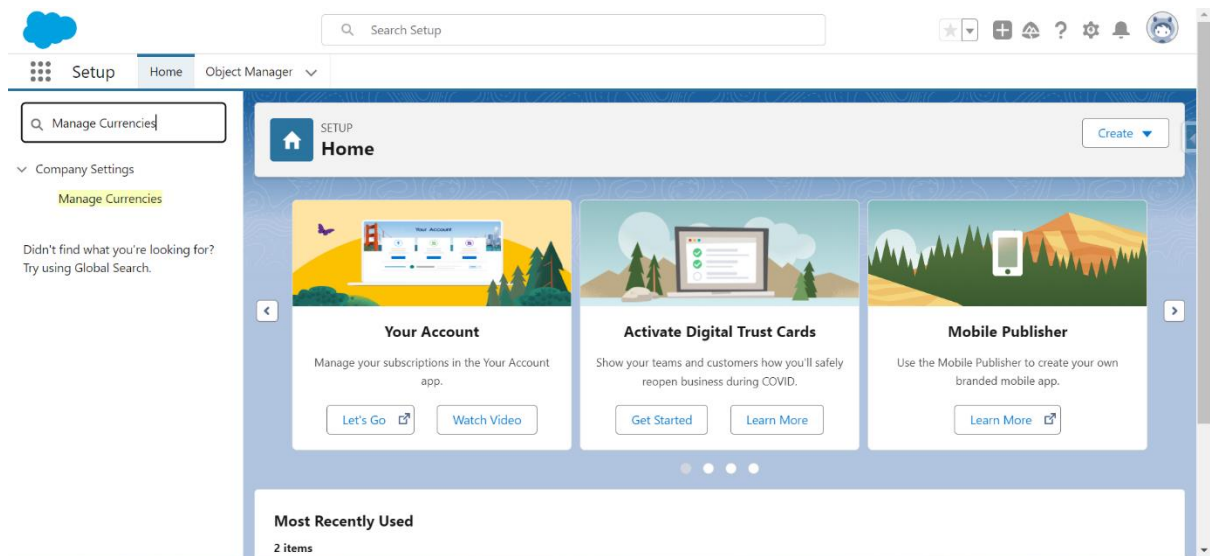
1. Once the Permission Set has been assigned to the user, we will proceed to enable Advanced Currency Management. To do this, we will first search for Company Information using Quick Find.



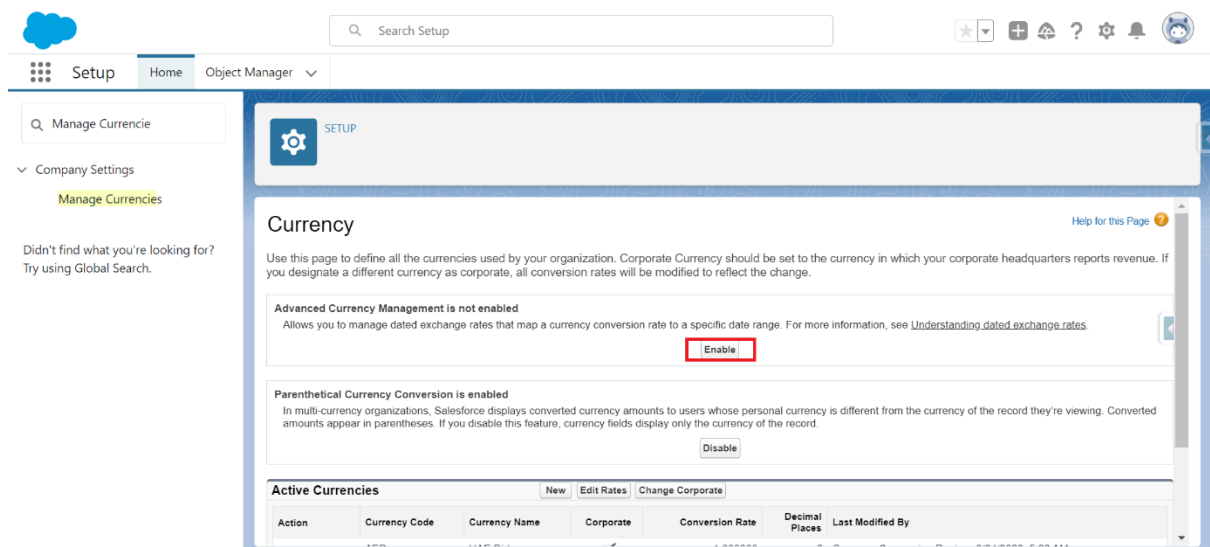
2. In the Company Information section, select the option "Activate Multiple Currencies."



3. After Checking this option, search for “Manage Currencies” from Quick Find.



4. Within the Manage Currencies section, click on the "Enable" button under the Advanced Currency Management section.



5. After clicking, another dialog box will appear. In this box, we need to check the checkbox asking for permission and then click on the Enable button.

Confirm Advanced Currency Management Settings



You are about to enable Advanced Currency Management.

Advanced Currency Management allows you to manage dated exchange rates that map a currency conversion rate to a specific date range.

Dated exchange rates are applied to currency fields on opportunities, opportunity products, opportunity product schedules, and opportunity reports. They are also applied to currency fields on quotes, quote line items, and quote reports. They are not applied to fields on other objects or when forecasting. Converted amounts do not appear on quote PDFs.

Roll-up summary fields are affected by advanced currency management. If your organization enables advanced currency management, delete any currency roll-up summary fields on accounts that summarize opportunities and any roll-up summary fields on opportunities that summarize custom objects.

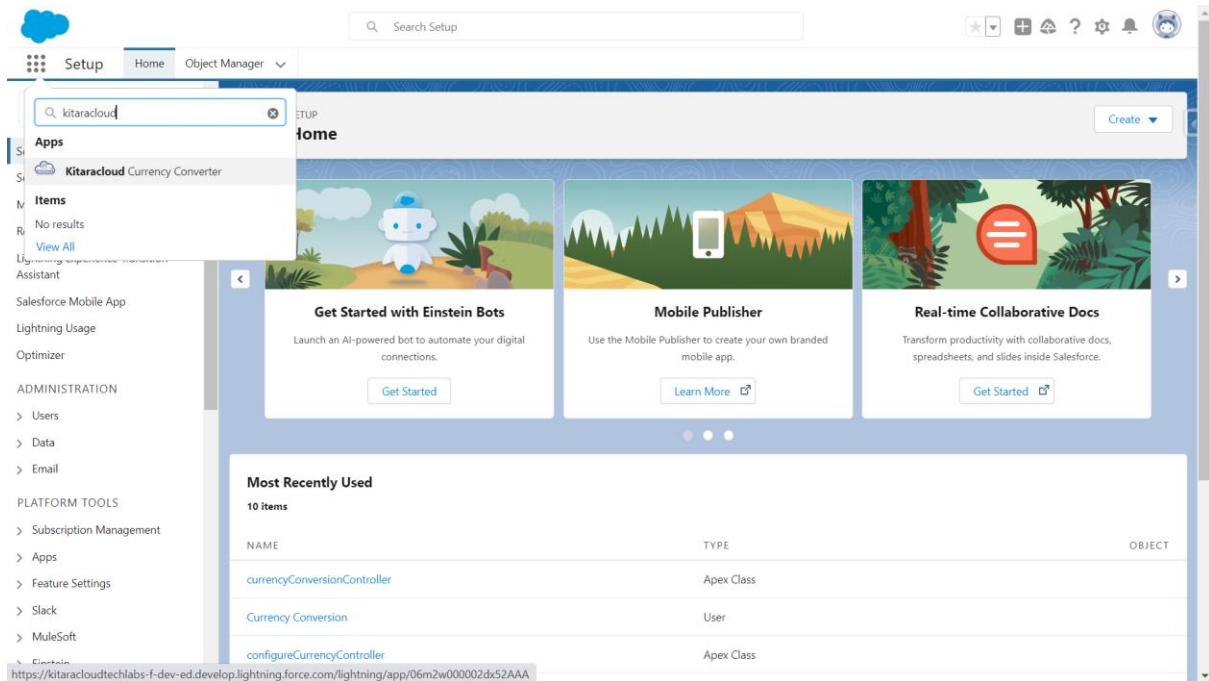
For more information on dated exchange rates, see [Understanding dated exchange rates](#).

☒ **Yes, I want to enable Advanced Currency Management.**

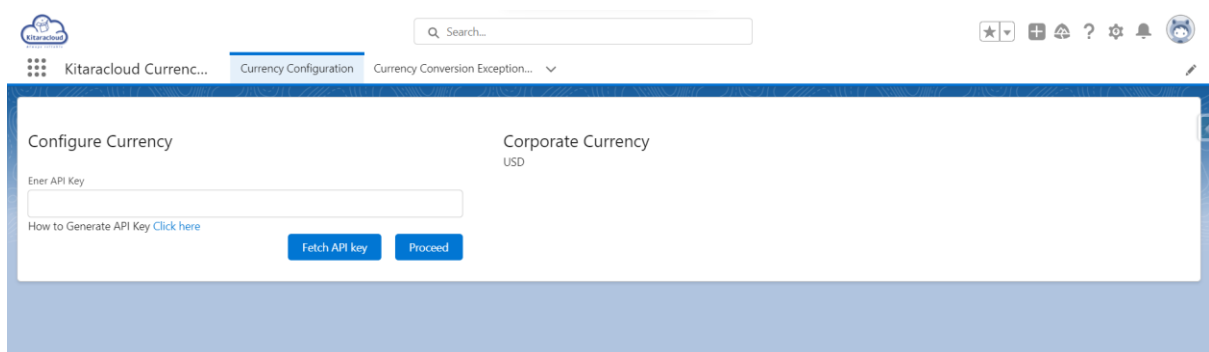
Enable Cancel

Steps to Update Conversion Rate.

1. After Installation, Go to App Launcher → Search for “Kitoracloud Currency Converter” application.



2. Enter API key
 - a. If you do not have Valid API key, click on the How to Generate API key.



- b. Once you click on Generate API key, a new tab will open with the page. From there, click on the 'Sign in' button.

The screenshot shows the APILayer website interface. At the top, there is a search bar with the text "Search API...", a green search button, and links for "Docs", "List Your API", and a green "Sign In" button. Below the header, the breadcrumb "API Marketplace / Currency / Fixer API" is visible. The main content area features the "Fixer API" logo, a description "Foreign exchange rates and currency conversion JSON API.", a 5-star rating, and two buttons: "Subscribe for Free" and "Live Demo". To the right, a code block displays a JSON response:

```
{  "date": "2018-02-22",  "historical": "",  "info": {    "rate": 148.972231,    "timestamp": 1519328414  },  "query": {    "amount": 25,    "from": "GBP",    "to": "JPY"  }}
```

. Below this, there are tabs for "Pricing", "API info", and "Documentation". At the bottom, a pricing section shows four plans: "Free Plan", "Starter Plan" (marked as "MOST POPULAR"), "Pro Plan", and "Enterprise Plan", each with a "Custom Plan" option. A "COOKIE SETTINGS" button is located in the bottom left corner.

- c. Upon clicking the 'Sign in' button, you will be presented with various sign-in options. Choose the one that suits you best and proceed with signing in.

This screenshot shows the same APILayer website as before, but with a sign-in modal open on the right side. The modal is titled "Sign in to APILayer" and includes the instruction "Start by choosing an account or email you use." It offers two social login options: "Sign in with Google" and "Sign in with Github", separated by an "OR" divider. Below these, there are input fields for "Email address" and "Password", with a "Forgot Password?" link next to the password field. A blue "Sign In" button is positioned below the password field. Another "OR" divider is present, followed by the text "Don't have an account? Signup". At the bottom of the modal, there are links for "Privacy" and "Terms". The background website content is dimmed, showing the same Fixer API page with pricing details: Free Plan (\$0.00), Starter Plan (\$14.99), Pro Plan (\$49.99), and Enterprise Plan (\$99.99).

- d. Once you've signed in, scroll down the page and choose the 'Free Plan' option under 'Pricing,' then click on 'Subscribe.' Please note that the Free Plan allows 1000 API requests per month, equating to 33 API requests per day.

The screenshot shows the API Layer website's pricing page. At the top, there's a navigation bar with the API Layer logo, a search bar, and links for Docs, List Your API, and a user profile icon. Below the navigation bar, there are buttons for 'Subscribe for Free' and 'Live Demo'. A code snippet is visible on the right side of the page. The main content area is titled 'Pricing' and features five plan cards: Free Plan, Starter Plan, Pro Plan, Enterprise Plan, and Custom Plan. The Free Plan is highlighted with a red box around its 'Subscribe' button. The Free Plan details include a price of \$0.00 Monthly, 1,000 Requests / Monthly, and Free for Lifetime. The Starter Plan is marked as 'MOST POPULAR' and includes 10,000 Requests / Monthly and Standard Support. The Pro Plan offers 100,000 Requests / Monthly and Standard Support. The Enterprise Plan offers 500,000 Requests / Monthly and Standard Support. The Custom Plan is labeled 'Volume' and offers 'Any requests volume you need'. A URL at the bottom left indicates the checkout page for the Free Plan.

Free Plan	Starter Plan	Pro Plan	Enterprise Plan	Custom Plan
\$0.00	\$14.99	\$49.99	\$99.99	Volume
Monthly	Monthly	Monthly	Monthly	Monthly
Subscribe	Subscribe	Subscribe	Subscribe	Contact Us
1,000 Requests / Monthly	10,000 Requests / Monthly	100,000 Requests / Monthly	500,000 Requests / Monthly	Any requests volume you need
Free for Lifetime	Standard Support	Standard Support	Standard Support	

<https://apilayer.com/marketplace/checkout/fixer/free-plan/589>

- e. Upon clicking 'Subscribe,' you will receive your API key. Make sure to copy it for further process.

The screenshot shows the API Layer website's subscription success page. At the top, there's a navigation bar with the API Layer logo, a search bar, and links for Docs, List Your API, and a user profile icon. The main content area features a large green checkmark icon and the text 'Subscription successful!'. Below this, there's a message: 'Thank you for your business with us! You can immediately start using the Fixer API now. You will also receive an email confirmation with details.' There are two buttons: 'Live Demo' and 'See API Documentation'. The section titled 'Your API Key' includes a message: 'Use this API key for each request. Please check docs for more information.' Below this, there's a text box containing the API key 'ESOt8LUOBvAbjIZv0LHYFjooqb1IKP4p' and a 'Copy to Clipboard!' button. A 'COOKIE SETTINGS' button is visible at the bottom left.

Subscription successful!

Thank you for your business with us! You can immediately start using the Fixer API now. You will also receive an email confirmation with details.

[Live Demo](#) [See API Documentation](#)

Your API Key

Use this API key for each request. Please check docs for more information.

ESOt8LUOBvAbjIZv0LHYFjooqb1IKP4p [Copy to Clipboard!](#)

[COOKIE SETTINGS](#)

3. Paste the copied API key and then select the "**Proceed**" button.

Kitaracloud Currency Configuration

Search...

Configure Currency

Corporate Currency: USD

Enter API Key: trHxpEOMATUvqTZgZ3YisS0HhOuY4tO

How to Generate API Key [Click here](#)

Fetch API key Proceed

4. Choose the desired currency for updating the conversion rate, then click on the "**Save**" button.

Kitaracloud Currency Configuration

Search...

Configure Currency

Corporate Currency: USD

Enter API Key: trHxpEOMATUvqTZgZ3YisS0HhOuY4tO

How to Generate API Key [Click here](#)

Fetch API key Proceed

Convert Rate Schedule

ISO Currency Code	Organization Rate	Today Rate
☐ BGN	1.795	1.78483
☐ BIF	2828.31	2819.465675
☐ BMD	1	1
☐ BND	1.35	1.349182
☐ BOB	6.91	6.911027
☐ BTN	82.52	82.62198
☐ BYN	2.52	2.524515
☒ EUR	0.91298	0.912685
☐ INR	82.74	82.631199
☐ SEK	10.91	10.841598

Reset Save

5. After saving, both the organization rate and Dated Conversion Rate will be automatically adjusted to reflect the current rate.



Search...



Kitecloud Currenc...

Currency Configuration

Currency Conversion Exception...

Configure Currency

Corporate Currency
USD

Enter API Key
trHxpEOMATUvqTZgZ3YisS0fHhOuY4tO
How to Generate API Key [Click here](#)

Fetch API key

Proceed

Convert Rate

Schedule

ISO Currency Code	Organization Rate	Today Rate
☐ BGN	1.795	1.78461
☐ BIF	2628.31	2809.300798
☐ BMD	1	1
☐ BND	1.35	1.3426
☐ BOB	6.91	6.865101
☐ BTN	82.52	82.220104
☐ BYN	2.52	2.507547
☒ EUR	0.91259	0.91265
☐ INR	82.74	82.6055
☐ SEK	10.91	10.83239

Reset

Save

Update the conversion rate on a scheduled basis.

1. Select the "Schedule" tab

The screenshot shows the 'Configure Currency' page in the Kitarcloud application. The 'Schedule' tab is selected under the 'Convert Rate' section. The page displays a table of currency conversion rates for various ISO codes. The 'Fetch API key' and 'Proceed' buttons are visible. The 'Reset' and 'Save' buttons are at the bottom right.

ISO Currency Code	Organization Rate	Today Rate
BGN	1.795	1.78483
BIF	2628.31	2819.465675
BMD	1	1
BND	1.35	1.349182
BOB	6.91	6.911027
BTN	82.52	82.62198
BYN	2.52	2.524515
EUR	0.91301	0.91301
INR	82.74	82.62605
SEK	10.91	10.85087

2. Choose the "Frequency" option

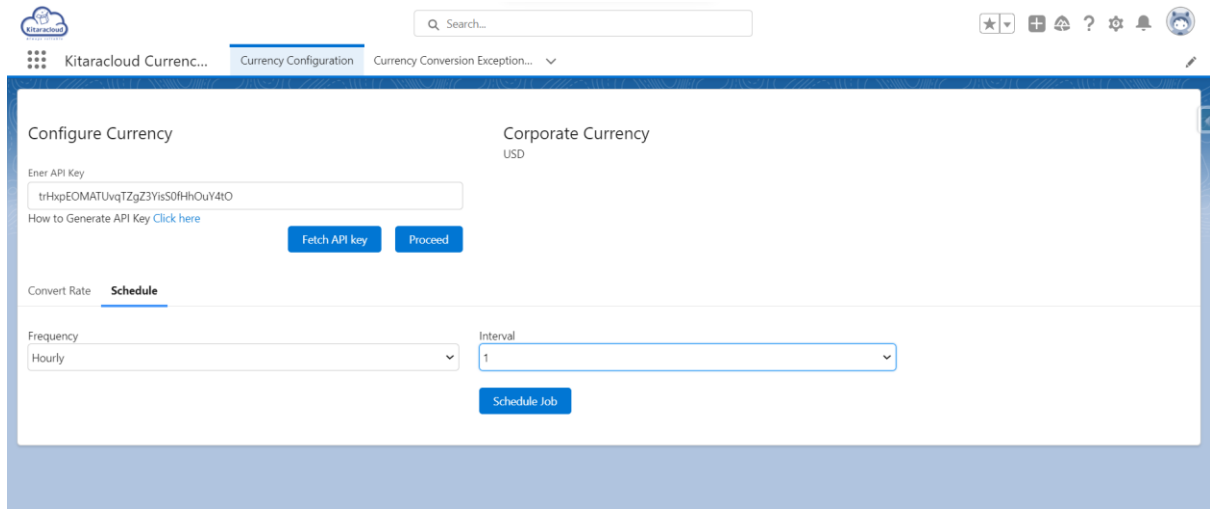
The screenshot shows the 'Configure Currency' page in the Kitarcloud application. The 'Schedule' tab is selected under the 'Convert Rate' section. The 'Frequency' dropdown menu is open, showing 'Hourly' as the selected option. The 'Interval' dropdown menu is also visible, showing '-- Please Select --'. The 'Schedule Job' button is at the bottom right.

Frequency: Hourly

Interval: -- Please Select --

Schedule Job

3. Choose the “Interval” option



The screenshot shows the 'Configure Currency' page in the Kitarcloud application. The 'Currency Configuration' tab is active. The 'Corporate Currency' is set to 'USD'. The 'API Key' field contains the value 'trHxpEOMATUvqTZgZ3YisS0fhOuY4tO'. The 'Convert Rate' section has a 'Schedule' sub-tab selected. Under 'Schedule', the 'Frequency' is set to 'Hourly' and the 'Interval' is set to '1'. A 'Schedule Job' button is visible at the bottom of the 'Schedule' section.

Kitaracloud Currency Configuration

Search...

Configure Currency

Corporate Currency: USD

Enter API Key: trHxpEOMATUvqTZgZ3YisS0fhOuY4tO

How to Generate API Key [Click here](#)

Fetch API key Proceed

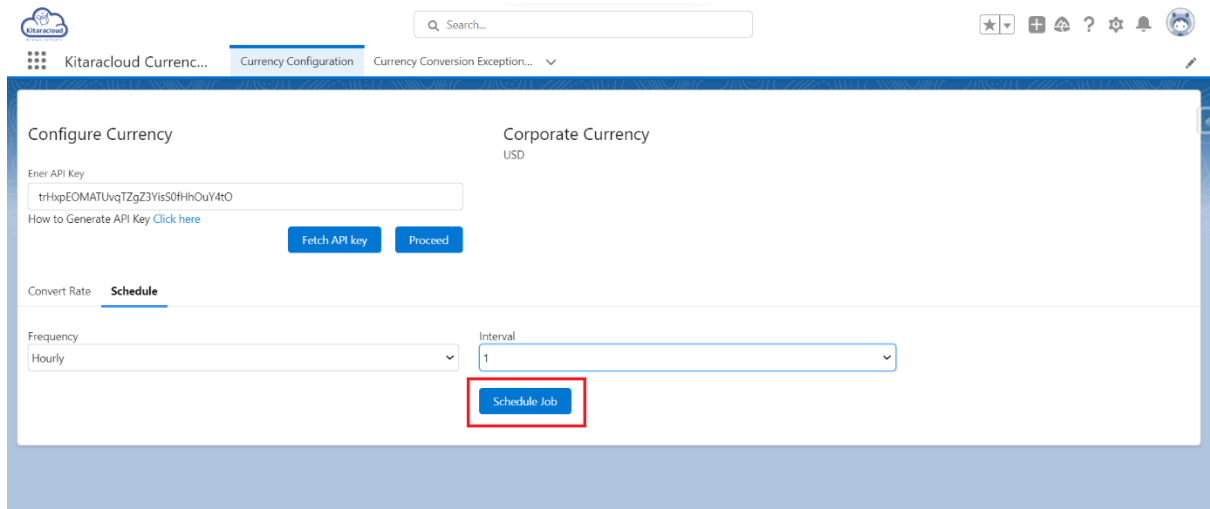
Convert Rate: **Schedule**

Frequency: Hourly

Interval: 1

Schedule Job

4. Click on “Schedule job” button



This screenshot is identical to the previous one, but the 'Schedule Job' button is highlighted with a red rectangular box to indicate the next step in the process.

Kitaracloud Currency Configuration

Search...

Configure Currency

Corporate Currency: USD

Enter API Key: trHxpEOMATUvqTZgZ3YisS0fhOuY4tO

How to Generate API Key [Click here](#)

Fetch API key Proceed

Convert Rate: **Schedule**

Frequency: Hourly

Interval: 1

Schedule Job

5. Verify in your organization that the scheduled job has been successfully created



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> MuleSoft

> Einstein

 SETUP

Scheduled Jobs

All Scheduled Jobs

Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs

Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Currency conversion job	Conversion_Currency	2/15/2023, 1:23 AM	2/15/2023, 2:00 AM	2/15/2023, 3:00 AM	Scheduled Apex
Del	Metalytics Data Loader Job for Org : 00D2w0000Nxzw7	User_Integration	1/18/2023, 1:32 AM	2/14/2023, 2:24 PM	2/15/2023, 2:24 PM	Autonomous Data Loader Job

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All