

INSTALLATION GUIDE V1.3

FOR

AUTO FX

29 JAN 2019



AppExchange:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000ErFbRUAV>

Queries:

info@bringingsolutions.com

More:

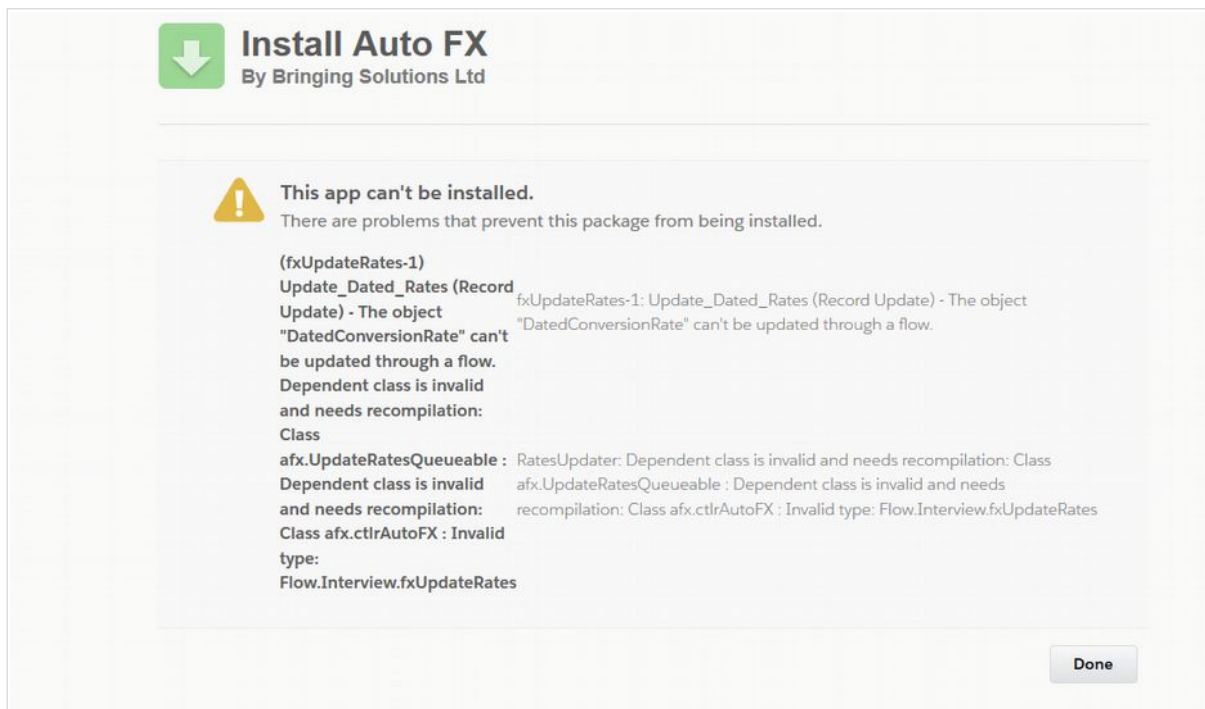
www.bringingsolutions.com

Thank you!

PRE-REQUISITES

Before you begin installing and using Auto FX, there are some simple pre-requisites.

- The application is for Admin users only – that is users with the “**System Administrator**” profile. The reason for this is that certain administrative permissions are required when working with currencies in Salesforce.
- Multi-currency must be switched on AND **Advanced Currency Management** (this is the same thing as Dated Exchange Rates). If you attempt to install the app without Advanced Currency Management you will see this error:

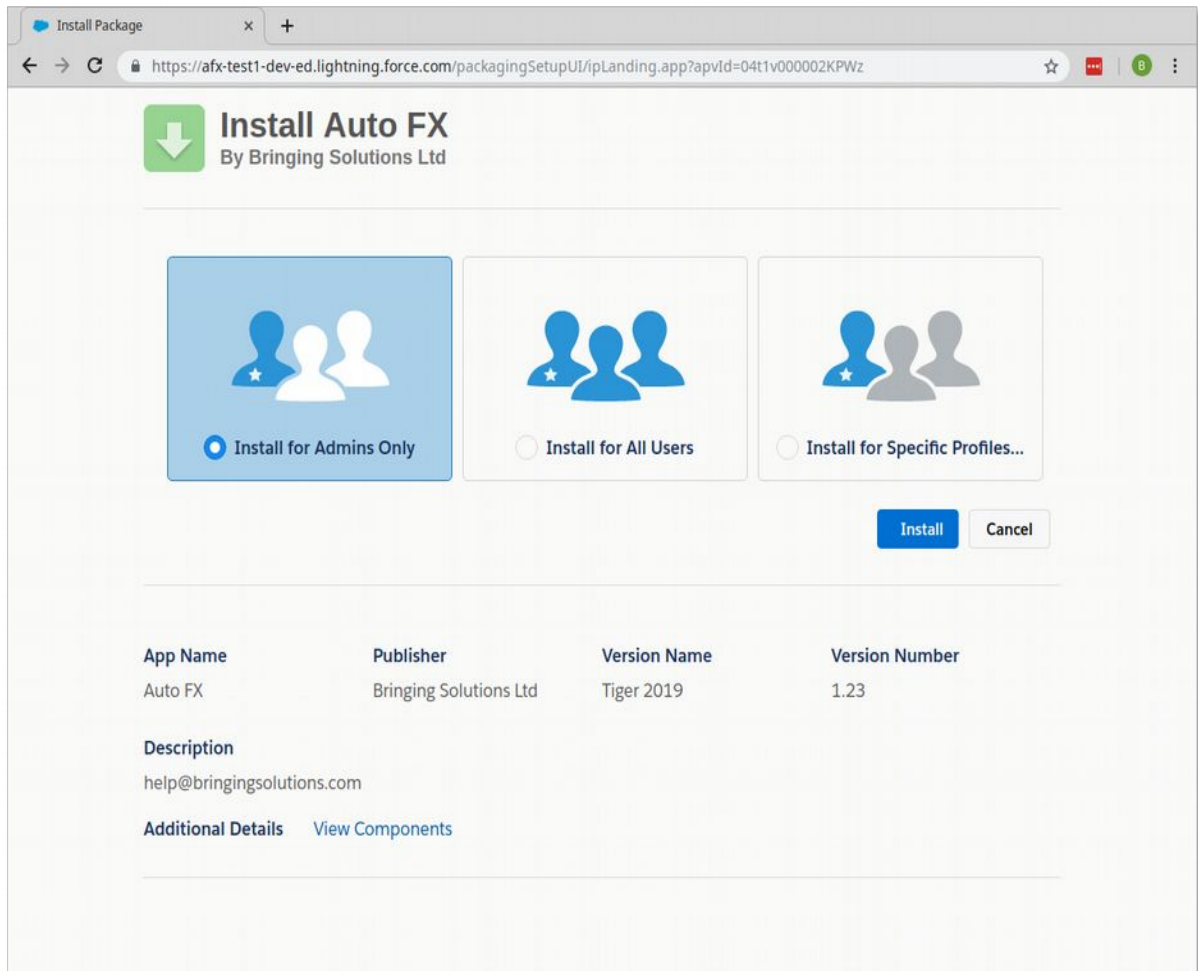


To enable advanced currency management:

1. Enable multiple currencies for your organization. For more information, see [Manage Multiple Currencies](#).
 2. From Setup, enter Manage Currencies in the Quick Find box, then select **Manage Currencies**.
 3. Click **Enable**.
 4. When prompted, select 'Yes, I want to enable Advanced Currency Management' and click **Enable**.
- If you are using the Lightning UX you will need to have “**My Domain**” setup. Most Orgs using Lightning will have this setup so should not be an issue. If not setup and you are unsure what steps to take then fire us an email and we will provide you with more details.

STEP 1: Install for Admins Only

After getting the app from the AppExchange the first step is to install the app for Admin users only.



Install Auto FX
By Bringing Solutions Ltd

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

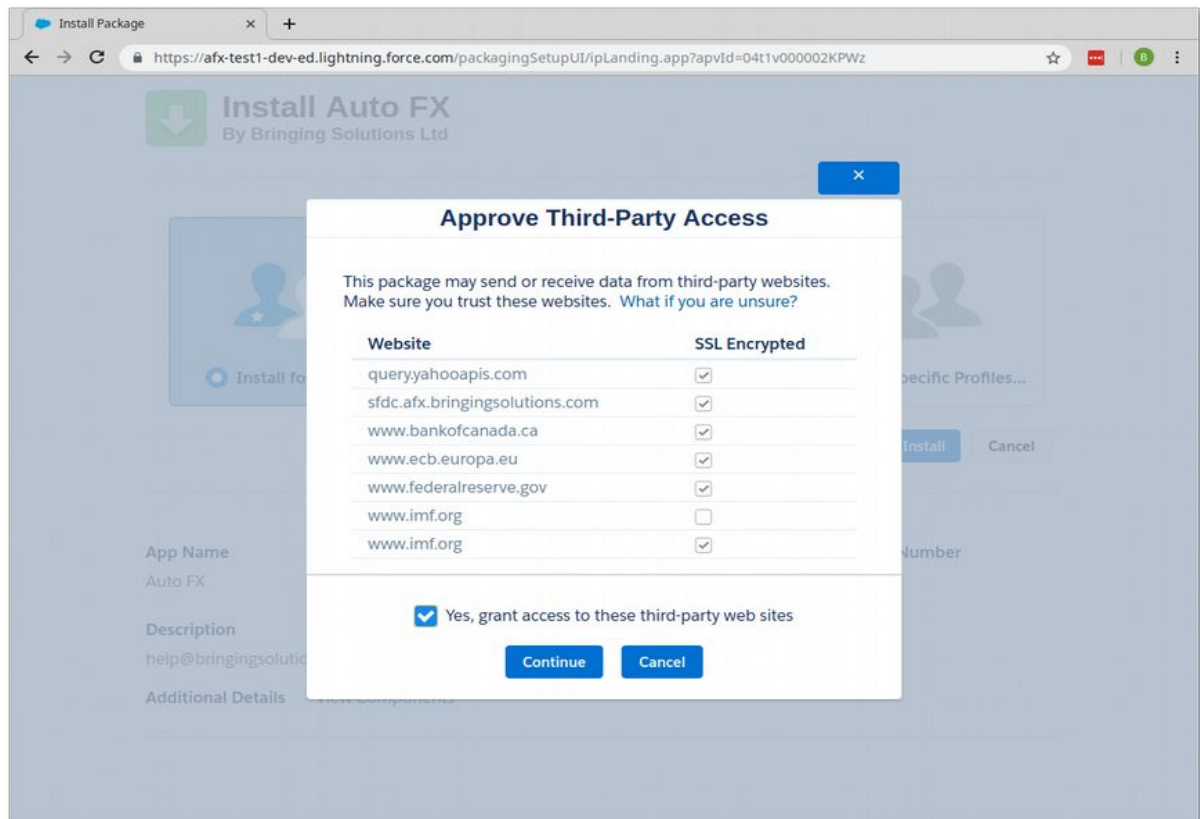
App Name	Publisher	Version Name	Version Number
Auto FX	Bringing Solutions Ltd	Tiger 2019	1.23

Description
help@bringingsolutions.com

Additional Details [View Components](#)

STEP 2: Approve Third-Party Access

Click on the “Yes, grant access to these third-party web sites” checkbox.



STEP 3: Wait

Wait for the application to complete installation. Click Done.

STEP 4: Assign to Permission Set

Assign the "Auto FX Admin" Permission Set to admin users (only) as required.

(Setup -> Permissions Sets -> "Auto FX Admin" -> Manage Assignments)

Assignment Summary

Auto FX Admin

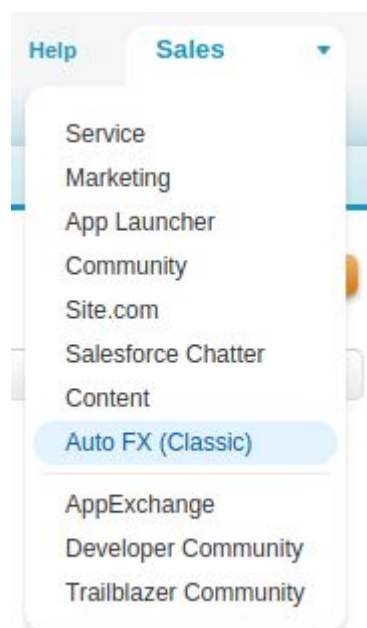
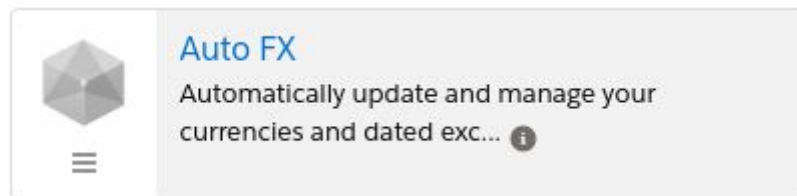


Permission set Auto FX Admin has been assigned to 1 user.

Done

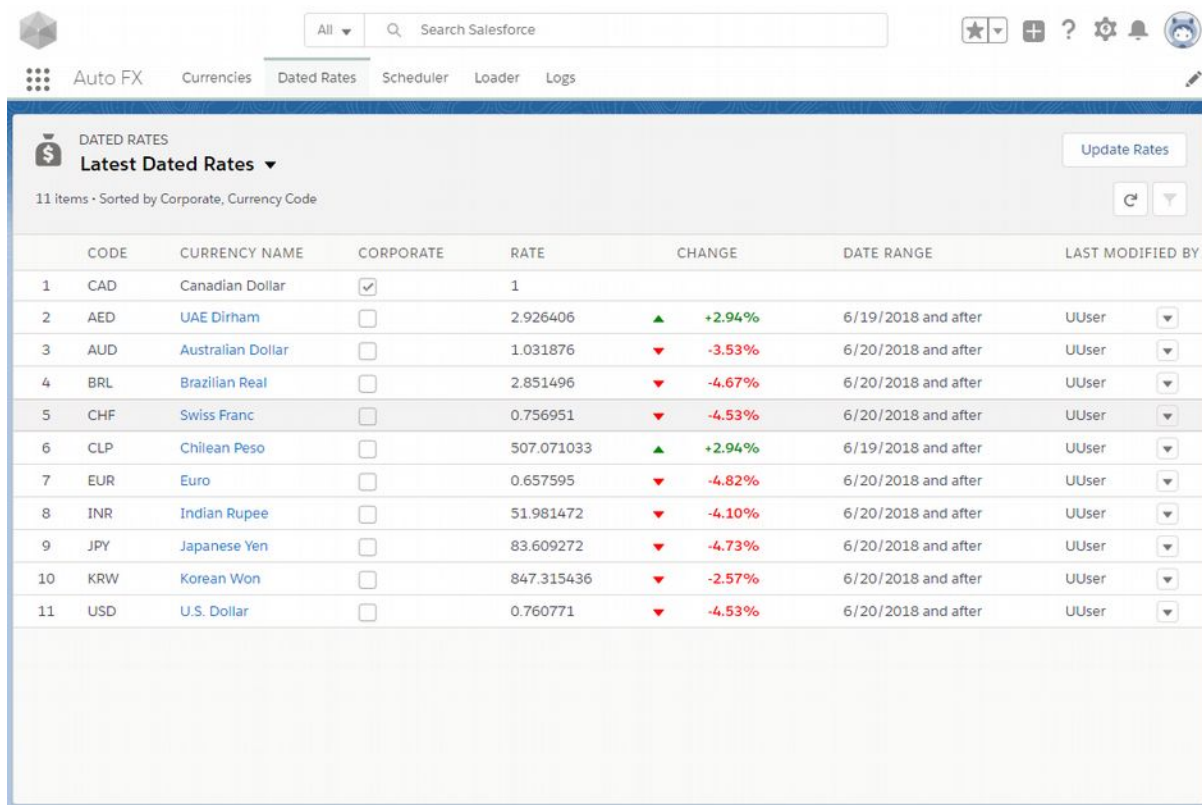
STEP 5: Navigate to the “Auto FX” App

Navigate to the app in Salesforce Lightning or Salesforce Classic.



STEP 6: See the *User Guide*

Download the “Auto FX User Guide” from the AppExchange to learn how to use the app’s tabs to manage all of your currency needs.



The screenshot shows the Salesforce AppExchange interface for the 'Auto FX' app. The 'Dated Rates' tab is selected, displaying a table of 11 currency rates. The table includes columns for CODE, CURRENCY NAME, CORPORATE, RATE, CHANGE, DATE RANGE, and LAST MODIFIED BY. The rates are sorted by Corporate, Currency Code. The table shows rates for CAD, AED, AUD, BRL, CHF, CLP, EUR, INR, JPY, KRW, and USD. The USD rate is 0.760771, and the change is -4.53%.

	CODE	CURRENCY NAME	CORPORATE	RATE	CHANGE	DATE RANGE	LAST MODIFIED BY
1	CAD	Canadian Dollar	☒	1			
2	AED	UAE Dirham	☐	2.926406	▲ +2.94%	6/19/2018 and after	UUser
3	AUD	Australian Dollar	☐	1.031876	▼ -3.53%	6/20/2018 and after	UUser
4	BRL	Brazilian Real	☐	2.851496	▼ -4.67%	6/20/2018 and after	UUser
5	CHF	Swiss Franc	☐	0.756951	▼ -4.53%	6/20/2018 and after	UUser
6	CLP	Chilean Peso	☐	507.071033	▲ +2.94%	6/19/2018 and after	UUser
7	EUR	Euro	☐	0.657595	▼ -4.82%	6/20/2018 and after	UUser
8	INR	Indian Rupee	☐	51.981472	▼ -4.10%	6/20/2018 and after	UUser
9	JPY	Japanese Yen	☐	83.609272	▼ -4.73%	6/20/2018 and after	UUser
10	KRW	Korean Won	☐	847.315436	▼ -2.57%	6/20/2018 and after	UUser
11	USD	U.S. Dollar	☐	0.760771	▼ -4.53%	6/20/2018 and after	UUser