

Smart Currency Converter

Lightning Component

Convert your currency in a few clicks in Lightning
Experience

USER MANUAL

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Smart Currency Converter User Manual

● Component Overview

Smart Currency Converter is a Salesforce native Lightning component. This component help you to easily convert your currencies into another currency unit. The component supports point and click graphical user interface which is very simple and easy to use.

Note: A custom domain name in Salesforce Org is required for a Lightning component to work successfully.

● Steps for Installation

1. **Install smart currency converter package:** Select Install for All Users and then click on **Install** button.



2. **Prerequisite to access the component :**

- A. Create an account on '[ExchangeRate-API](https://v6.exchangerate-api.com)' then copy the API key.
- B. Create Remote site settings with endpoint: '<https://v6.exchangerate-api.com>'.



SETUP

Remote Site Settings

Remote Site Details

Remote Site Detail

Edit

Delete

Clone

Remote Site Name	ExchangeRate
Namespace Prefix	AstreaCR
Remote Site URL	https://v6.exchangerate-api.com
Disable Protocol Security	☐
Description	
Active	☒
Created By	<u>Sonal Agarwal</u> , 6/13/2018 4:35 AM

Edit

Delete

Clone

C. Create the Quick action on any object of this component or drag and drop it on any Lightning page.

Steps to create Quick Action:

- Go to quick search box and enter the object name in which you want to create quick action (eg:**Account**) and select **buttons,links and actions**
- Click on **new action** button
- In Action type select '**lightning component**'
- In lightning component select '**AstreaCR:CurrencyRate**'
- Enter **CurrencyConverter** on the label
- Click on **the save** button
- Add this quick action on Account page layouts.

Account Actions
New Action

The 'Enter Action Information' dialog box contains the following fields and options:

- Object Name:** Account
- Action Type:** Lightning Component
- Lightning Component:** AstreaCR:CurrencyRate
- Height:** 250px
- Standard Label Type:** --None--
- Label:** CurrencyConverter
- Name:** CurrencyConverter
- Description:** (empty text area)
- Icon:** Change Icon

There are 'Save' and 'Cancel' buttons at the top right and bottom right of the dialog.

Now click on **Account tab**, select any record and then click on **CurrencyConverter** button then following screen will appear.

The 'CurrencyConverter' modal window displays the 'Exchange Rates' section with the subtitle 'Find Exchange Rates of Target Currency'. It includes an 'API KEY' label and a text input field. Below the input field is an 'Authenticate' button. A 'Cancel' button is located at the bottom right of the modal.

you can also create this component in lightning page by clicking on **Gear icon-->edit page** and then drag and drop the component. After adding the component on page, the following screen will appear:

Account
Burlington Textiles Corp of America

+ Follow CurrencyConverter New Contact New Case

Type: Customer - Direct Phone: (336) 222-7000 Website: www.burlington.com Account Owner: pooja gupta Account Site: Industry: Apparel

Related Details News

We found no potential duplicates of this account.

Contacts (1) New

Jack Rogers
Title: VP, Facilities
Email: jrogers@burlington.com
Phone: (336) 222-7000

View All

Opportunities (1) New

Burlington Textiles Weaving Plant Generator
Stage: Closed Won
Amount: \$235,000.00
Close Date: 10/6/2018

Activity Chatter

Exchange Rates
Find Exchange Rates of Target Currency Re-Authenticate

Base Currency
USD

Target Currency
USD

Entered Amount
1

Get Exchange Rates

Enter API key: Enter API key and then click on Authenticate button, following screen will appear:

Website: www.burlington.com Account Owner: Account Site: Industry:

CurrencyConverter

Exchange Rates
Find Exchange Rates of Target Currency Re-Authenticate

Base Currency
USD

Target Currency
USD

Cancel

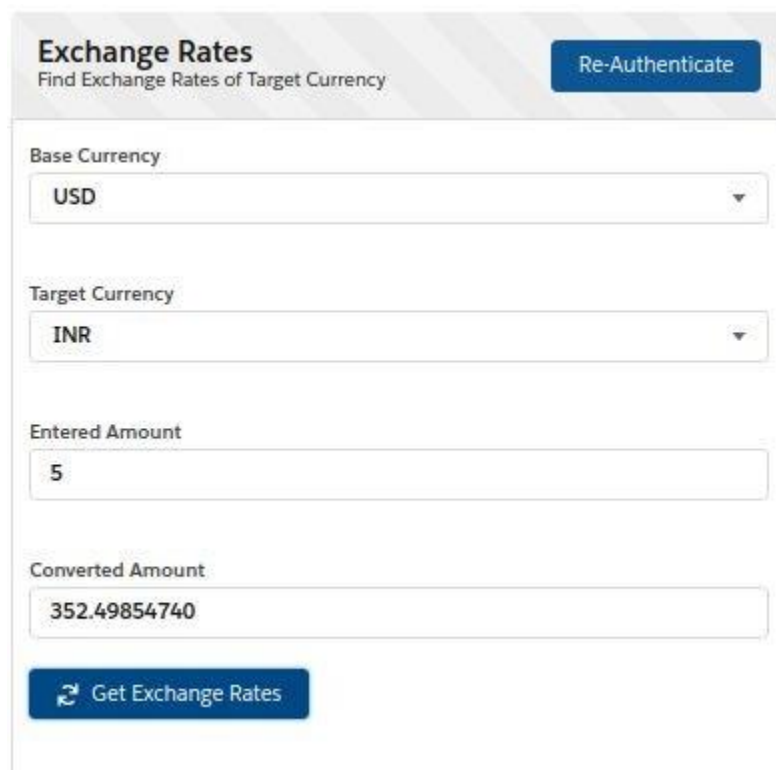
Public
Employees
9,000
SIC Code

Activity Chatter
New Task Log a Call N
Create a task...
Next Steps
Two next steps. To get things moving
Past Activities
No past activity. Past meetings and

● Working of Smart converter:

This component has three input fields 'Base currency', 'Target currency' and Entered Amount and one output field which show the result.

1. **Base Currency:** Specify the Base currency units you want to convert by selecting from picklists. For eg: (in case you want to change currency from USD to INR then select INR).
2. **Target Currency:** Specify the target currency unit in which you want to convert from picklists. For eg: (if you want to convert your currency into INR then select INR).
3. **Entered Amount:** Enter the Amount you want to convert. For eg: (if you want to convert 5 USD to INR. Then you will enter 5 in the Column).



The screenshot shows a web form titled "Exchange Rates" with the subtitle "Find Exchange Rates of Target Currency". In the top right corner, there is a blue button labeled "Re-Authenticate". The form contains four input fields: "Base Currency" with a dropdown menu showing "USD", "Target Currency" with a dropdown menu showing "INR", "Entered Amount" with a text box containing "5", and "Converted Amount" with a text box containing "352.49854740". At the bottom of the form is a blue button with a refresh icon and the text "Get Exchange Rates".

4. You can also change the API Key by clicking on **Re-Authenticate** button.

- **Business Benefits:**

1. The salesforce user can now directly convert currencies with salesforce without leaving the salesforce site, thus saving the time.
2. This lightening page can be used on the Homepage, on any record detail page or as a quick action.
3. This component can be used in those object detail pages which deal with multi currencies and other financial scenarios.