



Advanced Currency User Guide
V1.1

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What is Advanced Currency?

Magento comes out of the box with some powerful multi-currency functionality. Magento allows a single base currency to be automatically converted on the front end for your international customers. The trouble is that this converted value is not very user friendly.

Advanced Currency allows you to display a set price for a currency other than your base currency. This means that you can set friendly prices (i.e. 4.99 instead of 4.26) while still keeping your payment provider happy by using a single base currency. This will increase your conversion rate and simplify your customers' experience.

Advanced Currency applies this logic to all currency-related fields in Magento, including promotions, shipping, taxes, and discounts.

Features

- Display friendly pricing to international users
- Advanced Currency applies to all currency-related data in Magento - pricing, promos, taxes, shipping, etc.
- No need to set up multiple currencies with your payment provider
- Quick and easy install - just upload and refresh your cache
- Works with Magento versions 1.2.x, 1.3.x, and 1.4.x
- 30 day money back guarantee
- 30 days of free support

Known Limitations

- Because of the way Magento handles payment amounts and rounding, there are instances where the amount authorized and captured will be exactly .01 higher than the total invoice amount
- In some instances, it may appear in the back end that the base currency amounts on an order do not add up to the grand total correctly - this is a result of the rounding that occurs when dealing with multiple currencies and is not cause for concern
- In Magento 1.4.x, the feature that enables cart lines to be sent to PayPal will not work with this module; you can still have the feature enabled, but it will not work - for most users, this will not pose an issue as Magento gives the user ample opportunity to review the order and its contents
- The product grid in Catalog->Manage Products will still display amounts using the base currency, not the admin currency - this will be addressed in a future release
- The product create / edit pages will still prompt for prices to be input in the "Base currency" - this is because Magento treats prices as global - ignore this and input it as specified by your selected "Admin currency"

Installation

As with all Magento modules, we recommend applying the module to a non-production site. Note that this module will cause prices to display incorrectly until new currency rates are imported.

1. Backup your Magento directory
2. Unzip the downloaded file
3. Using an FTP client, upload the “app” directory into your Magento directory
4. Refresh your cache
 - a. Log in to your Magento admin area
 - b. Go to System->Cache Management
 - c. Select “Refresh” from the “All Cache” drop down
 - d. Click “Save cache settings”

Configuration

Configuring Advanced Currency is easy. From the Magento Admin area, go to System->Configuration->Currency Setup and select the desired “Admin currency”. This setting can be applied at the Website, Store or Store View level.

For simplicity, we recommend either using a separate Store or a separate Website that does not overlap with any of the categories in your current hierarchy.

After specifying your admin currency, you will need to import new currency rates by going to System->Manage Currency Rates, click Import and then Save Currency Rates. If you do not do this, pricing will not display on the front end.

If you use a Store View or a Store that has products in it that are visible in other Stores / Store Views, you will also need to create copies of all of your overlapping products specifically for this currency unless you feel that the conversion rate is not substantial enough to warrant separate pricing.

Important! You will also want to create new promotions and shipping to reflect this change in currency - otherwise, you stand to lose a lot of money as the front end will now display them as input!

How it Works

On the frontend, Advanced Currency will convert all currency data from the “Admin currency” to the customer’s selected display currency.

When items are added to the shopping cart and orders are created, the display currency is then converted to the base currency for your payment provider.

Example

Suppose you are a US-based company that does substantial business in the UK. Rather than display auto-converted values, you would like to provide your customers with friendly pricing, promotions, and shipping amounts without having to change your base currency.

In this example, we’ll create a store view for your UK customers and set up a few products.

Create a New Root Category

- From the admin area, go to Catalog->Manage Categories
- Click Add Root Category
- Name it “UK Store Root”
- Set Is Active to Yes
- Click Save Category

Create a Subcategory

- Still in Manage Categories, select Add Subcategory
- Name it “Apparel” (or whatever you want to call the category)
- Set Is Active to Yes
- On the Display Settings tab, set Is Anchor to Yes
- Click Save Category and verify that the category gets added as a child of “UK Store Root”

Create a Store

- From the admin, go to System->Manage Stores
- Click Create Store
- Select a Website and Name - we’ll call ours “UK Store”
- Select the newly created UK Store Root for the Root Category
- Click Save Store

Create a Store View

- Still in Manage Stores, click Create Store View
- Select UK Store from the Store dropdown
- Give it a Name, Code, and set the Status to Enabled - we’ll call ours “English”
- Click Save Store View

Select Admin Currency

- From the admin, go to System->Configuration
- Change the Current Configuration Scope to “UK Store” (or the new store view you have created)
- In Currency Setup->Currency Options, change “Admin currency” to British Pound Sterling (note that it needs to also be an allowed currency)
- Click “Save Config”

Import Currency Rates

- From the admin, go to System->Manage Currency Rates
- Click Import
- Click Save Currency Rates

Create Products for the New Store View

- From the admin, go to Catalog->Manage Products

- Select a product for editing and select Duplicate
- Enter a new SKU on the General tab
- Set Status to Enabled on the General tab
- Enter in the new friendly Price on the Prices tab - since we are converting from UK we'll take a 30 USD product and put in 20 GBP instead of the auto-converted 19.12
 - Note that it still says [USD] by all of the price and cost fields - this is because price is a global or website attribute in Magento (by design) - ignore it, this is really in GBP or your selected "Admin currency"
- On the Categories tab, remove the product from the original category and add it to the newly created Apparel category
- Click Save

Test It

- On the frontend, select the UK Store from the drop down (if you are using a default Magento template)
- Click Apparel
- You should see your one product displaying the price you input in the "Admin currency" - if you switch display currencies, notice that it now converts from the "Admin currency" to the selected display currency
- Add the product to your cart and checkout
- In the backend, view the order and notice that it converts everything to the base currency (USD in our case) while still showing you what your customer saw in brackets

Un-installation

1. Remove the following from your Magento directory:
 - a. app/code/local/Evolved/AdvancedCurrency
 - b. app/etc/Evolved_AdvancedCurrency.xml
2. Refresh your cache
 - a. Log in to your Magento admin area
 - b. Go to System->Cache Management
 - c. Select "Refresh" from the "All Cache" drop down
 - d. Click "Save cache settings"

Change Log

Version 1.0.1

- Corrected rounding issue
- Fixed bug that prevented importing of new rates

Version 1.0.2

- Introduced support for Magento 1.4.x
- Fixed bug that caused incorrect currencies to be displayed when adding products to orders through the back end

Version 1.1

- Completed fix of rounding issue that caused order totals, invoice amounts, and refund amounts to be differ
- Verified that module is compatible with Magento 1.2.x
- Made changes to make the module more compatible with other Magento modules