

Moffice CRM Countries & Currency

Introduction

For businesses with global offices, adding multiple currencies and countries for usage is helpful to track information from each office. Likewise, setting a default currency and country makes inputting data such as addresses, phone numbers, and finance-related fields more simple and streamlined. It also helps to view purchases and sales by currency for more exact records.

Utilize country and currency settings to match your business.

Country Settings

*Affects all address and phone number data



Default
Country



Other Countries with
Offices/Business/in Use

Currency Settings

*Affects all financial data



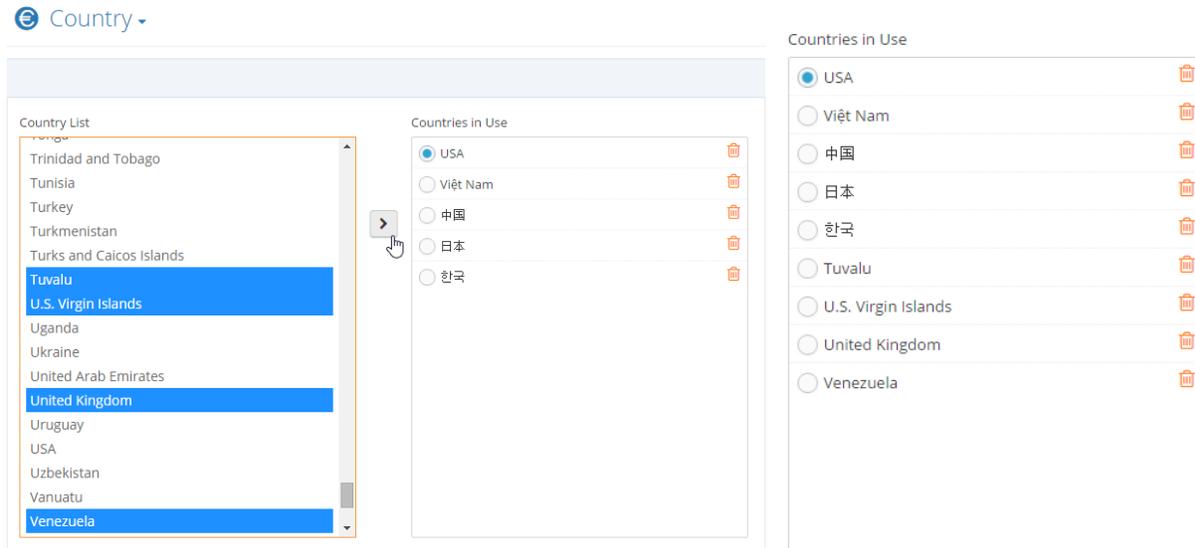
Default
Currency



Other Currencies in Use

Setting up Countries

First, go to Customization > Country / Currency > Country to editing country settings. Set up multiple countries by selecting them in the country list and moving them to the “Countries in Use” list. Select a default country by clicking on the radio button next to the desired country in the “Countries in Use” list. To delete a country, simply click the trashcan icon beside its name.



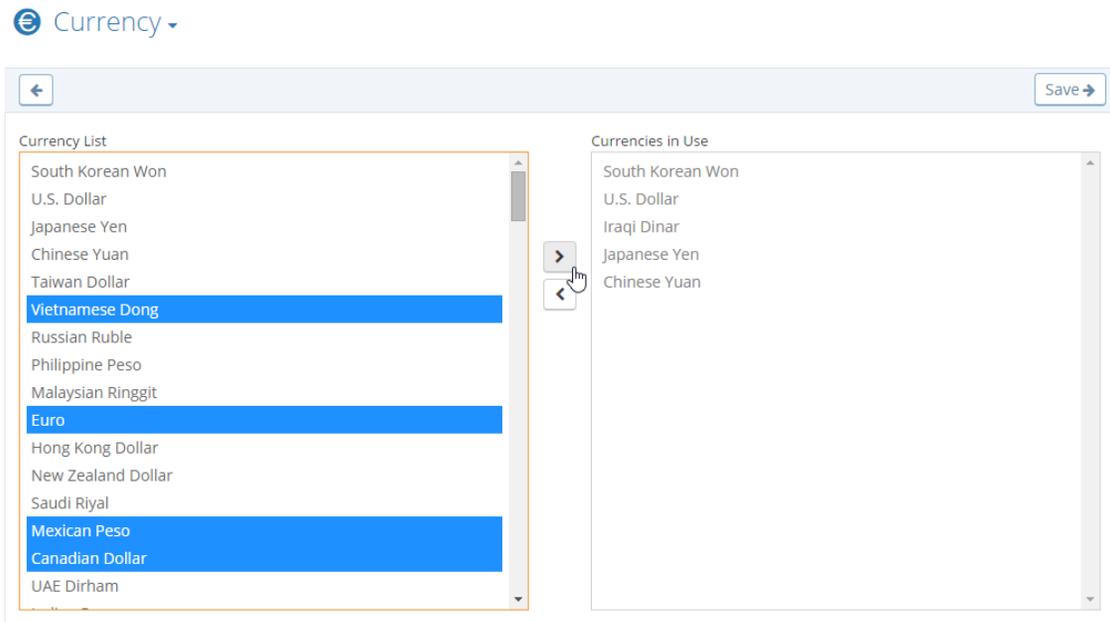
You can see the effects of changes made to countries in use. Note the default selected option is the default country. Countries in use can be selected in addresses and the default country's country code is automatically shown in the phone number country code field.

The screenshot shows a form with several fields. The 'Phone' field has a dropdown menu with '1' selected and a globe icon. Below it is a 'Company Phone' dropdown and a '+' button. The 'Address' field has a dropdown menu with 'USA' selected and a list of countries: USA, Việt Nam, 中国, 日本, 한국, Tuvalu, U.S. Virgin Islands, United Kingdom, and Venezuela. To the right of the Address field are 'Zip Code', '-- State --', 'Address', and 'Company' dropdowns. The 'Website' field has a dropdown menu with 'domain.com' selected and an anchor icon, and a '+' button. The 'Memo' field is empty.

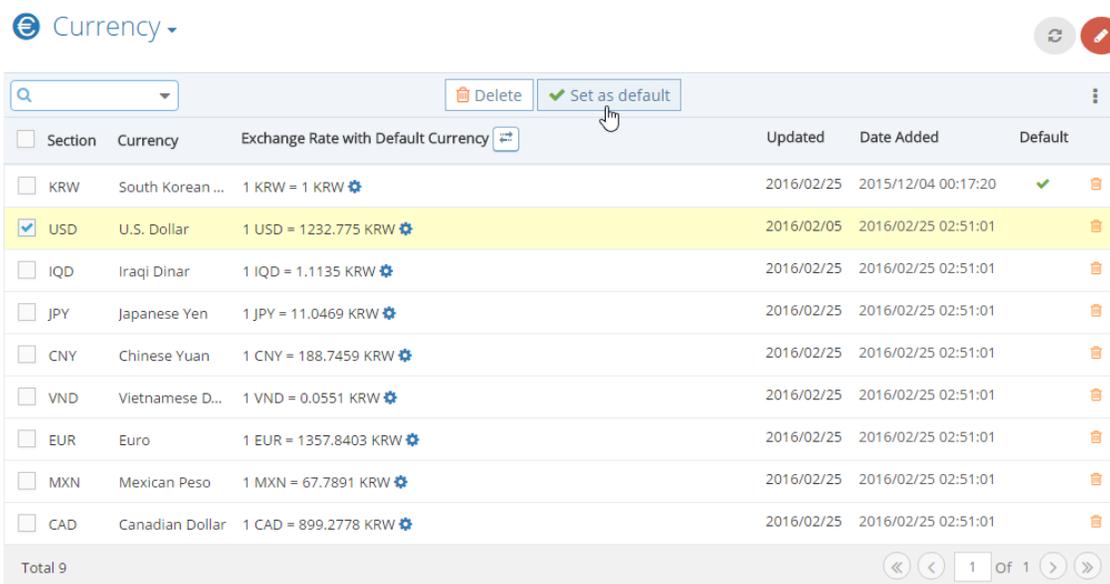
Setting up Currencies

Head to Customization > Country / Currency > Currency to start editing currency settings.

Adding a currency to the list is similar to adding a new country. First, click the pencil icon in the top right corner of the main currency sub-menu list. Then, simply select the desired currencies in the left available list and click the [>] arrow to move them to the “Currencies in Use” list on the right. Make sure to save changes and refresh to see the newly updated list.



To change the default currency, click the checkbox next to the desired currency from the main list and click the “Set as default” option. Likewise, you can delete multiple currencies from the list by checking the boxes next to their names for bulk deletion. Single deletion can also be done by the trash can icon.



There are also a few other helpful options that the currency menu offers.

Click the arrows icon next to “Exchange Rate with Default Currency” to change how you view the exchange rate.

Section	Currency	Exchange Rate with Default Currency
<input type="checkbox"/>	KRW	South Korean ... 1 KRW = 0.0008 USD
<input type="checkbox"/>	USD	U.S. Dollar 1 USD = 1 USD
<input type="checkbox"/>	IQD	Iraqi Dinar 1 IQD = 0.0009 USD
<input type="checkbox"/>	JPY	Japanese Yen 1 JPY = 0.009 USD
<input type="checkbox"/>	CNY	Chinese Yuan 1 CNY = 0.1531 USD
<input type="checkbox"/>	VND	Vietnamese D... 1 VND = 0 USD
<input type="checkbox"/>	EUR	Euro 1 EUR = 1.1015 USD
<input type="checkbox"/>	MXN	Mexican Peso 1 MXN = 0.055 USD
<input type="checkbox"/>	CAD	Canadian Dollar 1 CAD = 0.7295 USD

Section	Currency	Exchange Rate with Default Currency
<input type="checkbox"/>	KRW	South Korean ... 1 USD = 1232.775 KRW
<input type="checkbox"/>	USD	U.S. Dollar 1 USD = 1 USD
<input type="checkbox"/>	IQD	Iraqi Dinar 1 USD = 1107.1 IQD
<input type="checkbox"/>	JPY	Japanese Yen 1 USD = 111.595 JPY
<input type="checkbox"/>	CNY	Chinese Yuan 1 USD = 6.5314 CNY
<input type="checkbox"/>	VND	Vietnamese D... 1 USD = 22375 VND
<input type="checkbox"/>	EUR	Euro 1 USD = 0.9079 EUR
<input type="checkbox"/>	MXN	Mexican Peso 1 USD = 18.1855 MXN
<input type="checkbox"/>	CAD	Canadian Dollar 1 USD = 1.3709 CAD

You can also click the gears that appear next to the currency to edit its exchange rate value manually to your preferences as necessary.

Edit Conversion Rate

U.S. Dollar 1232.775

Edit Cancel

Section	Currency	Exchange Rate with Default Currency	Updated	Date Added	Default
<input type="checkbox"/>	KRW	South Korean ... 1 KRW = 1 KRW	2016/02/25	2015/12/04 00:17:20	✓
<input type="checkbox"/>	USD	U.S. Dollar 1 USD = 1232.775 KRW	2016/02/05	2016/02/25 02:51:01	
<input type="checkbox"/>	IQD	Iraqi Dinar 1 USD = 1107.1 IQD	2016/02/25	2016/02/25 02:51:01	