**Currency Configuration in moonstride**

*Easily manage and automate multi-currency support for international business. moonstride allows you to set up currencies, manually edit exchange rates, enable live exchange rate updates, and track a full audit history for maximum transparency.*

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**1. Introduction**

Currency settings in moonstride let you transact globally, apply system-wide exchange rates, and maintain historical accuracy for all bookings and services. Whether using live exchange rates through API integration or entering your own values, moonstride gives you the flexibility to match market realities or business needs.

**2. Accessing the Currency Screen**

**Navigation:** Go to **Widgets → Widget → Currency**

*Insert screenshot here showing the Currency listing screen and navigation path.*

* See all active/inactive currencies and current base/exchange rates at a glance.

**3. Editing Currency Details**

To update an existing currency:

1. Click the **Actions** gear icon next to the target currency and select **Edit**.
2. Fill or update the following fields:
   * **Currency Name:** The full name of the currency (e.g., British Pound).
   * **Currency Code:** Standard currency code (e.g., GBP, USD, EUR).
   * **Symbol:** Currency symbol (e.g., £, $, €).
   * **Value:** Standard is 1 for the system's default currency; for other currencies, use the conversion rate relative to the default.
   * **Set as Default Currency:** Optionally set as the platform-wide default (only one default allowed).
   * **Status:** Set as Active or Inactive.
   * **Booking Date:** Assign date ranges for bookings when specific exchange rates should apply (add multiple rows as needed).
   * **Service Date:** Assign date ranges for services to which separate rates apply (add multiple rows as required).
   * **Exchange Rate:** Set the exchange rate to be used (relative to default).
3. Click **Save** to confirm your updates.

*Insert screenshot here showing the Edit Currency form, including booking/service date grids and exchange rate entry fields.*

**Tip:** Use Booking Date/Service Date for advanced scenarios where past or future bookings/services require fixed historic rates.

**4. Viewing the History Log**

To view who changed currency settings and when:

* Click the **Actions** gear icon for any currency and select **History Log**.
* A pop-up window shows a list of all edits, including the user, date, and specific changes.

*Insert screenshot here of the History Log pop-up, displaying an audit trail.*

**5. Live Currency Exchange – Open Exchange Rate API**

moonstride integrates with the Open Exchange API to support **live exchange rate automation** as an add-on feature.

**How to Activate and Use:**

1. **API Configuration:** Enter your Open Exchange Rate API credentials in the integration settings. *Insert screenshot here showing API credentials entry.*
2. **Scheduler Configuration:** Set the date, time, and time-zone for your automated exchange rate updates. *Insert screenshot here showing scheduler settings for timing/frequency.*
3. **Markup Percentage:** Define a markup or buffer percentage for each desired currency. The rate used in moonstride will be: Market Rate + Markup Percentage *Insert screenshot here of markup percentage configuration and currency list.*
4. **Automatic Rate Updates:** Once the scheduler runs, the system updates all rates automatically. New quotes and bookings use current rates, and supplier costs can be refreshed for old bookings as needed.
5. **Audit and History:** All automated rate changes are tracked in each currency’s **History Log**.

**How to Get Started:** Contact the moonstride support team to activate the Open Exchange Rate API add-on. They can advise on any additional costs and assist with the setup.

**6. Searching and Filtering Currencies**

* Use the **Status** filter to display all, only active, or only inactive currencies.
* Use the **Filter/Search** button (top right) to quickly locate currencies by name, code, or other details.

*Insert screenshot here showing the search and filter area in the currency list.*

**7. See Also**

* [Financial Reporting Configuration](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Supplier Payment and Invoicing](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking and Quotation Setup](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Live Integration and Automation Add-ons](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

With moonstride’s currency configuration, your global transactions become seamless—whether you need fixed, historical, or live-updated rates. Screenshots at every significant step (as indicated above) will guide your team through setup and usage. Should you need real-time exchange rates, reach out to support to enable the Open Exchange Rate API and automate your workflows.