

Knowledge Base



Introduction

If your organisation deals with suppliers or customers who live in other countries, it's possible that you will need deal with more than just the currency that your main office deals in. Gojee supports the handling of multiple currencies through the Multi-Currency add-on. Enabling Multi-Currency will allow you to change your invoices, purchase orders, and more to reflect the type of currency that your contacts are using.

Setting Up Multi-Currency

As long as a contact in Xero is set up to use a different currency, that currency will become available for selection from within Gojee for all quotes, invoices, purchase orders, and contacts. If you're setting this up for the first time, you will need to pick a contact and change their currency.

You can do this by editing the contact and picking the desired currency from the Financial Details menu.

Contact details

Addresses

Financial details

Default settings

Sales defaults

Purchase defaults

Financial details

Bank account name

BSA

These details will show against the bills to pay when you create a batch payment.

BSB code

980 918

Bank account number

-03451237

Reference

Bayside Hold

Currency

Canadian Dollar

Q |

My currencies

Australian Dollar (default)

AUD

Canadian Dollar

CAD

Swiss Franc

CHF

Japanese Yen

JPY

Mexican Peso

MXN

US Dollar

USD

All currencies

Albanian Lek

ALL

Cancel Save & close

An example contact is shown below.

BC

Bayside Club

Bob Partridge

secretarybob@bsclub.co

02 2024455

P O Box 3354, South Malling Centre, Ridge Heights, Madeupville, MVL 6001

Support Clients (monthly)

Activity

Contact details

Financial details

Files

Edit

New

Financial details

Bank account name

BSA

BSB code

980 918

Bank account number

-03451237

Details

Bayside Hold

ABN

11 000 111 000

Currency

Canadian Dollar

Sales defaults

Sales GST

GST on Income

Branding theme

Standard

Purchase defaults

Purchase GST

GST on Expenses

History and notes

Add note

Within Gojee, you will now have access to the Financial Information tab for each contact. You will be able to pick from among the currencies that other contacts have.

You will need to manually convert all the supplier pricing to the new currency.



Supplier: Local Hardware

[Contact Details](#)**Financial Details**[Supplier's Catalogue](#)

Default Currency

AUD

AUD

CAD

CHF

JPY

USD

MXN

Note: As noted in the above image, if you change a supplier to be in a different currency, you will need to manually convert all of that supplier's pricing to the new currency.

Additionally, although you may change the defined currency of contacts freely from within Gojee, you will not be able to change the defined or display currency for your organisation in either Gojee or Xero. If you wish to change your organisation's currency, please contact Xero first.

Purchasing

Purchase orders from suppliers will now have their currency noted at the top left of purchase orders.

Purchase Order to Building Supplies Limited

Currency: USD | Lead Time: 2 | Date: 05/02/2024 | Exp Delivery Date: 05/04/2024 | Reference:

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time	
IS001	Ceiling Fan	Each	2	113.0000	226.00	2	Change Supplier
IS002	Arlec 9W Tri Colo...	Each	5	3.5000	17.50	1	Change Supplier

Total Order: 243.50
(Tax Exclusive)

[+ Add a new line](#)

Purchase orders will automatically be set to the supplier's currency. Unlike invoices and quotes, the PO currency is not able to be changed from this menu, as the bill you receive is not under your control. If a supplier is billing in a different currency, you should change the supplier's currency directly.

When processed through the standard purchase order > receive goods > raise supplier bill in Xero process, the Xero invoice will reflect the supplier’s currency.

Purchases overview > Purchase Orders >

Purchase Order PO-0025

Billed

Send

Print

Options

Contact

Building Supplies Limited

78 Barkly Street

MORNINGTON VIC 3931

AUSTRALIA

E-mail: info@buildingsupp

lies.com

Edit

Date

2 May 2024

Delivery Date

4 May 2024

Order number

PO-0025

Reference

Stock Purchase O

rder + J00001

Theme

Standard

USD United States Dollar 1 AUD = 0.654202 USD (2 May 2024, set by XE.com)

Tax exclusive

Item	Description	Quantity	Unit price	Disc %	Account	Tax rate	Region	Amount USD
	Item Code IS001 - Ceiling Fan (Each) - Arlec 120cm White Chicago 4 Blade With light AC - Supplier SKU: BSL-T1 (Ceiling Fan)	2.00	113.00		850 - Suspense	BAS Excluded		226.00
	Item Code IS002 - Arlec 9W Tri Colour Dimmable LED Downlights (Each) - With Plug Bases - Supplier SKU: BSL-T2 (Arlec 9W Tri Colour Dimmable LED Downlights)	5.00	3.50		850 - Suspense	BAS Excluded		17.50
Subtotal								243.50
Total No GST								0.00
USD Total								243.50

When receiving the goods from these orders, the incurred costs shown in Gojee will be based on the exchange rate decided by Xero at time of raising the supplier bill for received goods or services.

Invoicing in Global Currencies

Invoicing customers is a bit more of a manual process, as every organisation’s method of doing this will be different. Invoices for customers will default to the customer’s currency, but the values from the BOM in local currency **are not converted automatically**. This is due to exchange rates changing over time and the variances in organisation preferences with how to handle invoices in non-local currencies. These will need to be manually updated to the values your organisation decides to go with. If you decide to invoice in local currency instead, you must change the invoice back to local currency in the dropdown. In this case, no value modification will be necessary.

You are selecting a foreign currency. The values from the BOM in local currency are not converted automatically. Please update the unit price if needed.

X

Create New Invoice

Total Job Quote (): -

Already Invoiced (): -

(Tax Exclusive)

Customer

ABC Furniture

EUR

Due Date

05/06/2024

Reference

Job: J00003

Branding Theme

Standard

Show sales person

Item Code	Name	Qty	Unit Price	Discount %	Region	Income Account	Amount
IS003	Reverse Cycle Split System Air Conditioner	1	1575.00		Please select...	Sales	1,575.00
-	Electrician	1	120.00		Please select...	Sales	120.00
IS004	Call Out Fee	1	100.00		Please select...	Sales	100.00
-	4 Pack Downlights	1	45.00		Please select...	Sales	45.00

Add a new line

Add a new description line

Total Invoice (EUR): 1,840.00

If you wish to invoice a customer in some other currency that your organisation works in, the dropdown currency selector will allow you to pick from available currencies (picked from currencies present among your contacts).

Quotes and Estimates

Much like invoices, while quotes and estimates will select the customer’s currency by default, values will not be converted from what is shown on the BOM. They will also have a dropdown currency selector you can use to change the currency of the quote.

Jobs > Job J00002 > Estimates + Feedback

Estimates - Bayside Club - J00002 Open Approved Rejected All Email Quote New Estimate

Quote Number	Reference	Currency	Total (Tax Exclusive)	Date Issued	Status	Sent	
4 - J00002	-	CAD	5,557.60	02 May 2024, 12:36	Open	No	Quote Actions
ORC1075	3 - J00002	CAD	5,557.60	02 May 2024, 12:33	Approved	No	Quote Actions
ORC1048	2 - J00002	CAD	5,512.60	24 Apr 2024, 14:42	Rejected	No Sales Order	Quote Actions
ORC1047	1 - J00002 - Quote 1	AUD	5,512.60	24 Apr 2024, 13:18	Open	No	Quote Actions

If you are going to be working with a non-local currency, it may be worth holding multiple versions of a quote so you can see the relevant amount in different currencies for your own reference.

Prepayments

Taking prepayments/deposits in a currency that is not the organisation’s currency are not supported at this time. These will NOT be applied towards invoices with a mismatched currency. Only invoices in the organisation’s local currency will have prepayments applied to them.