Knowledge Base



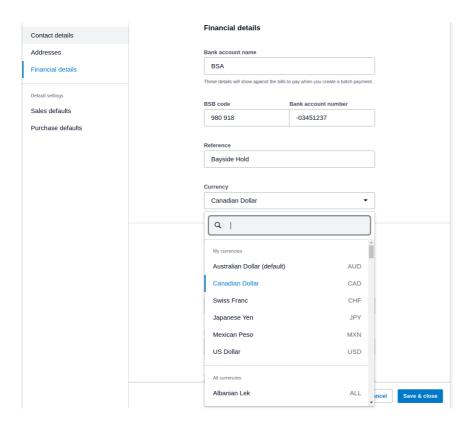
Introduction

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.

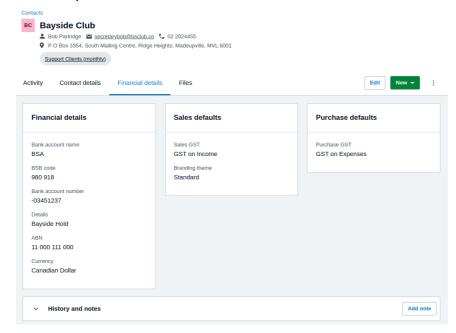
Setting Up Multi-Currency

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.

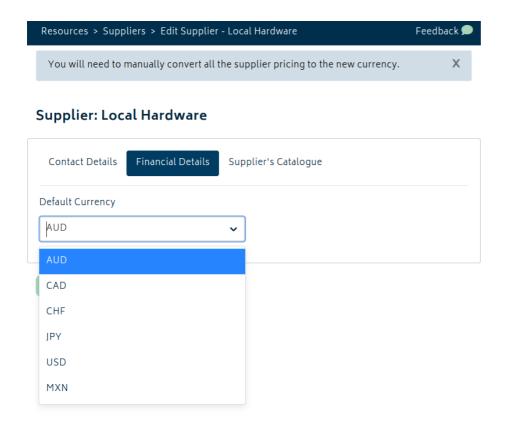
You can do this by editing the contact and picking the desired currency from the Financial Details menu.



An example contact is shown below.



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.

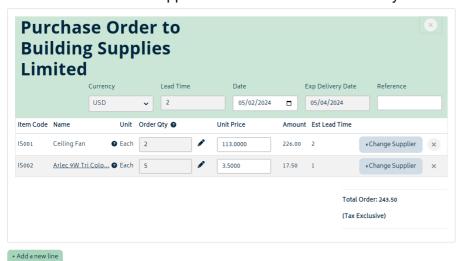


Note: As noted in the above image, if you change a supplier to be in a different currency, you will need to manually convert all of that supplier's pricing to the new currency.

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.

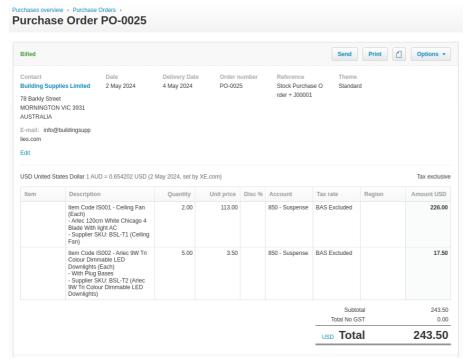
Purchasing

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



Purchase 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.

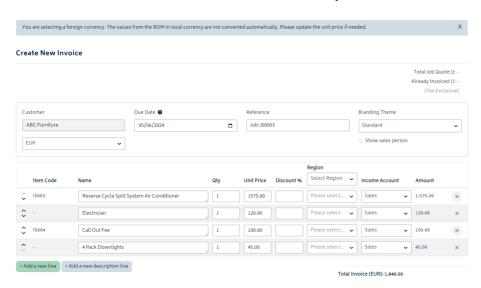
When processed through the standard purchase order > receive goods > raise supplier bill in Xero process, the Xero invoice will reflect the supplier's currency.



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

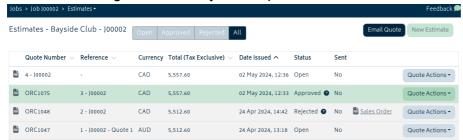
Invoicing customers is a bit more of a manual process, as every organisation's method of doing this will be different. Invoices for customers will default to the customer's currency, but the values from the BOM in local currency *are not converted automatically*. This is due to exchange rates changing 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.



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.



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.