

Currency Support

About Currency Support

LeadMaster includes the ability to support multiple currencies for a workgroup. The supported currency or currencies for a workgroup are defined by the administrator. The following currency fields can support multiple currencies:

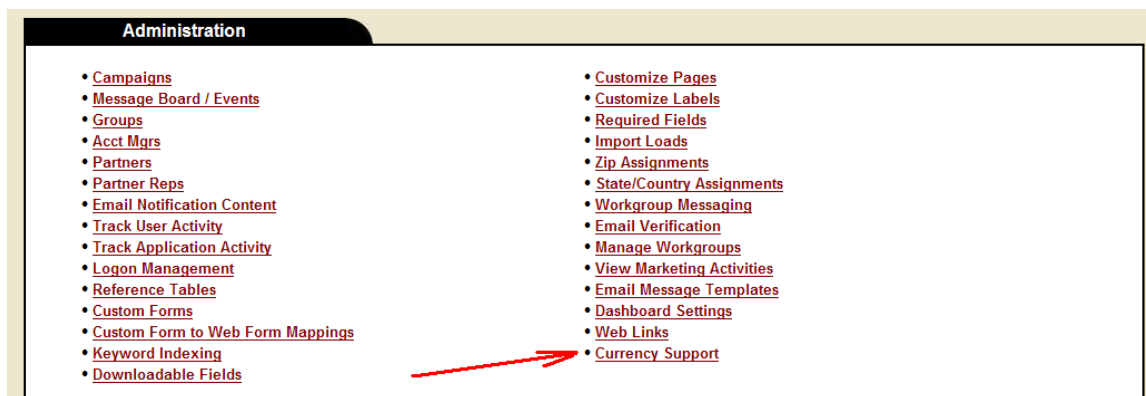
1. Company revenue and lead value for a record / lead
2. Opportunity product unit price, line item total and total opportunity value for an opportunity

Overall Process for Implementing Multi-Currency Support

1. The administrator identifies and configures the currencies that are supported for the workgroup.
2. The administrator decides which currency is the base currency for the workgroup. The currency values for the supported fields (above) are stored in the base currency.
3. The administrator decides which currency is the default display currency for the workgroup.
4. The administrator decides if the default display currency for the workgroup can be overridden at the record level – meaning that one record / lead can have a lead value in US dollars and a second record / lead can have a lead value in Euros.
5. The administrator decides if the default display currency for the workgroup can be overridden by user preference for display currency – meaning that one user can view currency values in reports in US dollars and another user can view the same currency values in reports in Euros.

Configuring Support for Multiple Currencies

From the “Administration” page, click on the “Currency Support” link to display currency support pages.



Each workgroup by default does not support multiple currencies and lists only the US dollar as the supported currency.

Currency Support

Currency Support Options

Support multiple currencies

Supported Currencies

Currency	ISO Code
US Dollar	USD

[edit](#) | [delete](#)

To add support for additional currencies, check the “Support multiple currencies” checkbox.

Currency Support

Currency Support Options

Support multiple currencies

Default display currency for the workgroup can be overridden at the record level

Default display currency for the workgroup can be overridden by the user preference for display currency

Supported Currencies

Currency	ISO Code	Exchange Rate	Base Currency	Default Display Currency
US Dollar	USD	1	€	€

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When multiple currencies are supported for the workgroup, the following options are available to the administrator:

1. The ability to add additional supported currencies for the workgroup.
2. The ability to allow the default display currency for the workgroup to be overridden at the record level.
3. The ability to allow the default display currency for the workgroup to be overridden by the user preference for display currency.
4. The ability to set the base currency for the workgroup
5. The ability to set the default display currency for the workgroup

Adding Support for Additional Currencies

1. To add additional supported currencies, click on the orange ‘Add Currency’ tab.

Add Currency

Currency Information

✓ ISO Code

✓ Currency

✓ Symbol

✓ Exchange Rate: 1.00 =

A ✓ indicates a required field.

2. A supported currency includes the following detail:
 - a. The ISO Code for the currency.
 - b. A long name for the supported currency.
 - c. The symbol (e.g. \$) for the supported currency.
 - d. The exchange rate (relative to the base currency) for the supported currency.
3. Currently, the following currencies are supported (support for additional currencies can be added as needed):
 - a. Australian dollar
 - b. Canadian dollar
 - c. Euro

- d. Hong Kong dollar
- e. US dollar

How Currency Values Are Stored and Displayed

1. Currency values are stored in the base currency for the workgroup
2. For records and opportunities, the currency values are displayed in the default display currency for the workgroup unless:
 - a. If the administrator has configured currency support to allow the default display currency for the workgroup to be overridden at the record level the currency values for the record and associated opportunities are displayed based on the currency associated with the record:

The screenshot shows a CRM interface with the following details:

- Primary Contact Info:** Name Mr Jim Schemmer, Title VP of MIS, Company ACS Network Inc, Address 1 6030 N US Hwy 301, City Elm City, State MD, Zip 20814, Country UNITED STATES, Web Address www.ptc.com. Group Gulf, Acct Mgr Don Hall, Partner Global Technologies, Partner Rep Sally Jones, Campaign Glory Days, Phone 301-447-8930 x222, Alt Phone, Cell/Mobile, Fax 301-552-1136, Company Revenue 300 000 000,00 €, # Emp. 23,000, Unique ID 9613xx.
- Sales Progress:** Lead Status SUSPECT, Initial Status HOT, Lead Value 200 000,00 €, Sales Stage Recommended, Forecast Date April 2007, Close Date 3/20/2004, Probability 100%, Lead Source Harris Info.
- Deals Table:**

ID	Opportunity	Status	Forecast Date	Close Date	Win Prob.	Stage	Total	Updated
17	XR8000 DEAL	Active	January 2007	15/2004	90%	Proposal Submitted	39 800,00 €	3/20/2006
							TOTAL: 39 800,00 €	

- b. If the administrator has configured currency support to allow the default display currency for the workgroup to be overridden by user preference for display currency AND the display currency has not been set at the record level the currency values for the record and associated opportunities are displayed based on the user preference for default display currency.

or updated call backs/events:

ON OFF

Outlook Sync If a contact is not matched with an existing record during sync:

Automatically create a new record with new contact as primary

Save contact to Filing Cabinet

Currency Display currency values in the following currency:

HKD

3. Marketing and Opportunity Reports, Custom Reports and Dashboard Charts display currency values in the default display currency for the workgroup unless the administrator

has configured currency support to allow the default display currency for the workgroup to be overridden by user preference for display currency. In this case, the currency values are displayed based on the user preference for default display currency.

Opportunity Forecast Report										Records 1 thru 25 - (127 total records)		
Fixed Filter: Forecast Date is not blank												
Sorted By: Forecast Date, Total Opportunity Value DESC, Win Probability DESC												
Forecast Date	Opportunity Name	Company	Key Contact	Acct Mgr	Partner	Partner Rep	Sales Stage	Total Opportunity Value	Win Probability	Weighted Opportunity Value		
January 2007	Premium Support Package	Vantage Communication	Bain Rudd	Don Hall	Computer Mart	Jean Pepin	Closed	700 000.00 €	100%	700 000.00 €		
January 2007	PMGR 3.8 DEAL	Four Cities Internet	Bruce Small	Don Hall	Global Technologies	John Vail	Approved	90 000.00 €	90%	81 000.00 €		
January 2007	PMGR 3.8 DEAL	WYKO Inc.	Phillip Quijano	Bob Decker	Advanced Systems	Bob Smith	Quality	90 000.00 €	75%	67 500.00 €		
January 2007	PMGR 3.8 DEAL	Link Communications	Singh Nielsen	Don Hall	Global Technologies	Bob Jones	Recommended	88 000.00 €	50%	43 000.00 €		
January 2007	XR8000 DEAL	ACS Network Inc.	Jim Schemmer	Don Hall	Global Technologies	Sally Jones	Proposal Submitted	39 800.00 €	90%	35 820.00 €		
January 2007	PREMIUM SUPPORT PACKAGE	Global Systems Inc.	William Paust	Don Hall	Global Technologies	John Vail	Prospecting	35 000.00 €	90%	31 500.00 €		
January 2007	XR8000 DEAL	Kimberly Communications Inc.	Greg Maggi	Don Hall	Global Technologies	Sally Jones	Approved	12 400.00 €	90%	11 160.00 €		

Opportunity Detail Report										Records 1 thru 25 - (127 total records)			
Fixed Filter: Opportunities Sales Status NOT INACTIVE													
Sorted By: Last Updated, Total Opportunity Value DESC													
Last Updated	Forecast Date	Opportunity Name	Company Info	Key Contact	City, State Phone	Group / Acct Mgr	Partner / Partner Rep	Status	Stage	Opportunity Source	Win Probability	Total Opportunity Value	
8/20/2006	February 2007	PMGR 3.8 DEAL	Hamilton & Hughes Advertiser Inc. www.bentley.com	Frank Bond	Atlanta, VA 703-258-0830	Gulf Don Hall	Global Technologies Sally Jones	Active	Proposal Submitted	Advertisement	75%	152 000.00 €	
Products and Services Detail:										Product	Quantity	Price	Total
										PMGR 3.8	76	2,000.00 €	152 000.00 €

Information Center

Recent Items



Action Printing- Marketing Leads Database

Use LeadMaster to create, assign, track and measure qualified leads and market manage and build a healthy pipeline of opportunities for your extended business cl on sales opportunities resulting in measurable returns on investment.

Opportunity Detail Report

Total number of opportunities: 127

Total value: 6 942 470,00 €

