



# Magento Currency Auto Switcher Extension

User Guide

mageworx

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# 1. Extension Description

**Magento Currency Auto Switcher Extension** adds the global flexibility to your Online Store. The extension allows you to automatically switch currency based on user location, convert prices to customers' local currencies and more.

*GeoIP* – automatically detects customers country and city in real time using *Max Mind* technology. The database can easily be updated from the back-end.

*Currency Settings* – allows to define Country-Currency relations.

*Currency Switcher* – automatically tracks customer's IP address and switches the default currency. Lets customers pre-select billing and shipping country during the checkout. Locks currency switching ability for certain countries, IP addresses or URLs.

*Customer and Order Location Tracking* – allows you to track customers geographical location and each orders' geographical origin in real-time.

*Auto-Switching Disabling* – lets you avoid switching currencies for certain User Agents or certain search engine spiders.

## 2. Extension Installation

To install the extension, please follow the steps below:

1. Disable the Compilation Mode (if enabled);
2. Log out from the Magento 2 Admin Panel (if logged in);
3. Unpack the content of the Extension folder (depending on your current Magento version) from the package file purchased from Mageworx to your Magento root folder;
4. Log in to the Magento 2 Admin Panel;
5. Go to System – Cache Management section, select Refresh under the All Cache drop-down menu and press the Save Cache Settings (if Cache Control is enabled in Magento);
6. Go to System – Configuration – MageWorx tab – Extensions & Support section. If you see Store & Currency Auto Switcher on the list of installed MageWorx extensions, the installation is done;
7. Re-run the Compilation Mode again (not enable it but re-run).

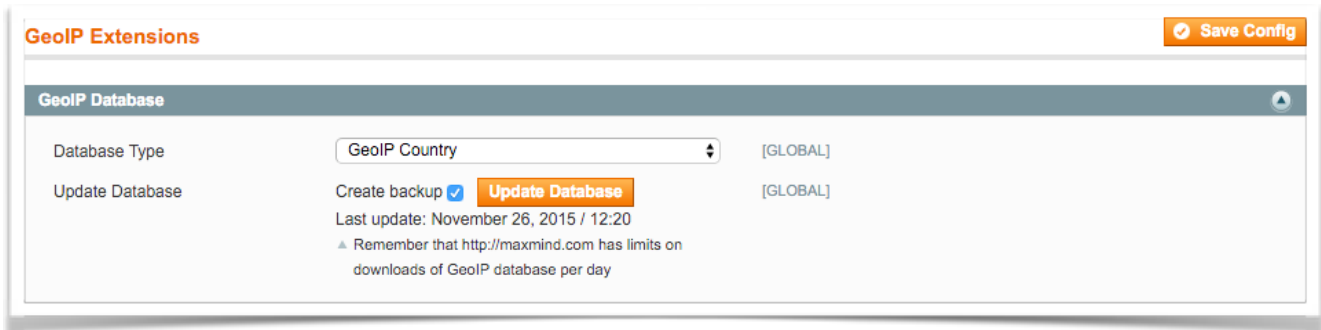
### 3. General Settings

To ensure the correct performance of the extension, the GeoIP module should be set up.

Jump to *System – Configuration* to start.

#### GeoIP Configuration

Select *MageWorx – GeoIP Extension* and open **GeoIP Database** tab:

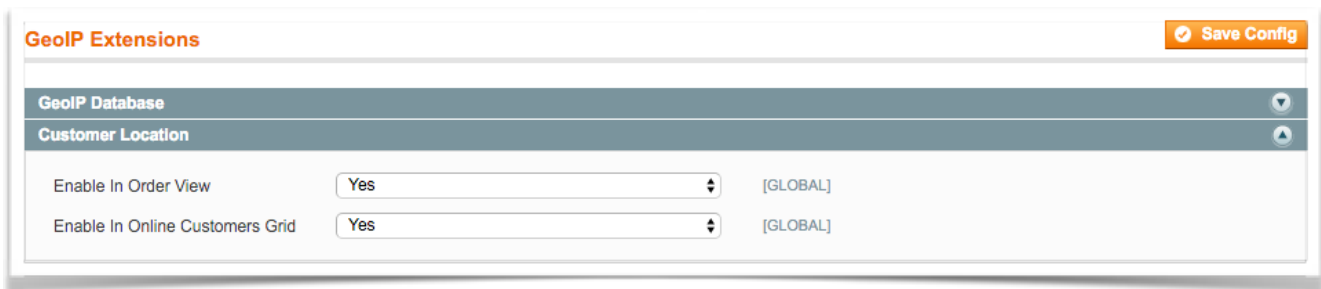


The extension supports two types of GeoIP database: *GeoIP Country* and *GeoIP City*.

**Note!** To use the City database you need to download it first from [maxmind.com](http://maxmind.com) and upload to your server to the 'lib/GeoIP' folder.

*Update Database* – hit this button to update the current GeoIP database. Mark the checkbox *Create Backup* to create a backup before updating.

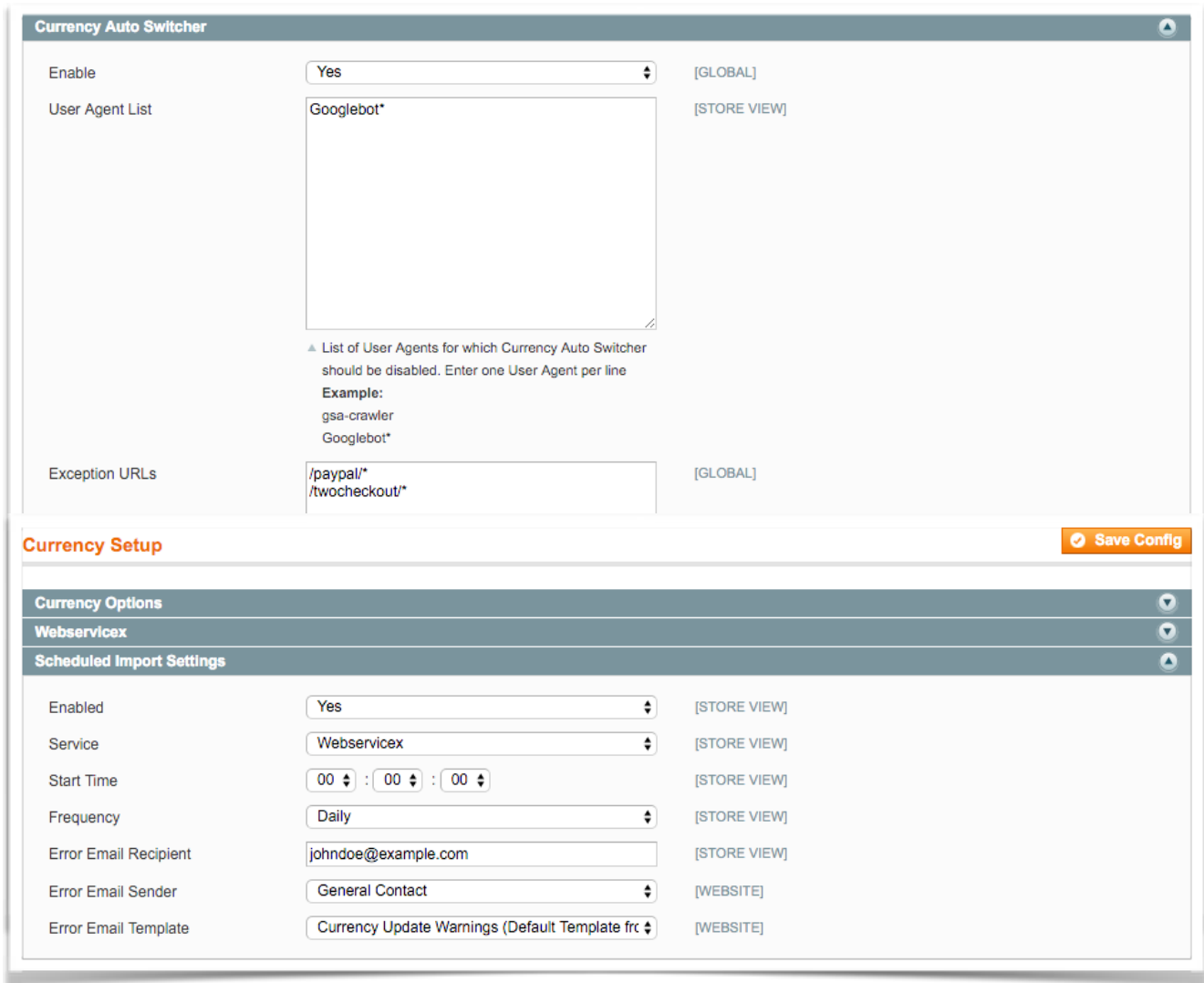
Open **Customer Location** tab:



*Enable in Order View* – enable or disable customers current location in the Order View.

*Enable in Online Customers Grid* – enable or disable customers current location in the Online Customers Grid.

Open **Currency Auto Switcher** tab:



**Currency Auto Switcher**

Enable: Yes [GLOBAL]

User Agent List: Googlebot\* [STORE VIEW]

Exception URLs: /paypal\*, /twocheckout\* [GLOBAL]

▲ List of User Agents for which Currency Auto Switcher should be disabled. Enter one User Agent per line  
Example:  
gsa-crawler  
Googlebot\*

**Currency Setup** Save Config

**Currency Options**

**Webservicex**

**Scheduled Import Settings**

Enabled: Yes [STORE VIEW]

Service: Webservicex [STORE VIEW]

Start Time: 00 : 00 : 00 [STORE VIEW]

Frequency: Daily [STORE VIEW]

Error Email Recipient: johndoe@example.com [STORE VIEW]

Error Email Sender: General Contact [WEBSITE]

Error Email Template: Currency Update Warnings (Default Template frc) [WEBSITE]

**Enable** – set *Yes* or *No* to enable or disable Currency Auto Switcher.

**User Agent List** – the list of user agents, the currency won't be switched for.

**Exception URLs** – the list of URLs, the currency switcher should be disabled for.

## Currency Auto Switcher Configuration

Select *General* – *Currency Setup* and open **Currency Options** tab:

**Base Currency** – set currency to be used for all online transactions in your store.

**Default Display Currency** – set currency to display by default in your store.

**Note!** *Default Display Currency* doesn't affect the *Base Currency*. All the transactions will be held in the *Base Currency*.

**Currency Setup** Save Config

**Currency Options**

Base Currency: US Dollar [WEBSITE]  
▲ Base currency is used for all online payment transactions. Scope is defined by the catalog price scope ("Catalog" > "Price" > "Catalog Price Scope").

Default Display Currency: US Dollar [STORE VIEW]

Allowed Currencies [STORE VIEW]

- Barbadian Dollar
- Belarusian Ruble
- Belize Dollar
- Bermudan Dollar
- Bhutanese Ngultrum
- Bolivian Boliviano
- Bosnia-Herzegovina Convertible Mark
- Botswanan Pula
- Brazilian Real
- British Pound Sterling

*Allowed Currencies* – specify the list of the allowed currencies in your store.

Open **Scheduled Import Settings** tab:

Scheduled Import option allows to set up automatic database update for currency rates.

**Currency Setup** Save Config

**Currency Options**

**Webservicex**

**Scheduled Import Settings**

Enabled: Yes [STORE VIEW]

Service: Webservicex [STORE VIEW]

Start Time: 00 : 00 : 00 [STORE VIEW]

Frequency: Daily [STORE VIEW]

Error Email Recipient: johndoe@example.com [STORE VIEW]

Error Email Sender: General Contact [WEBSITE]

Error Email Template: Currency Update Warnings (Default Template frc) [WEBSITE]

*Enabled* – set Yes or No to enable or disable scheduled database import.

*Service* – choose service provider for currency rates database.

*Start Time* – set a start time for database update.



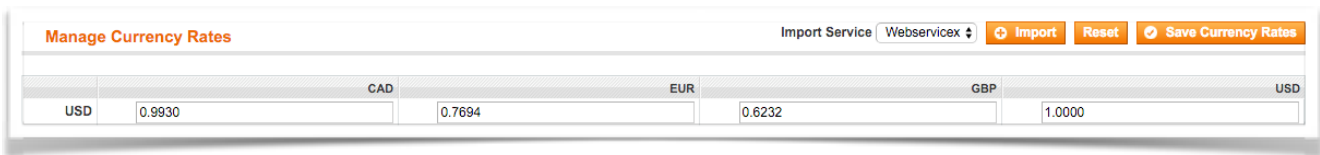
*Frequency* – specify the frequency of database updates.  
*Error Email Recipient* – set email recipient to be notified if the error occurred.  
*Error Email Sender* – set email sender if the error occurred.  
*Error Email Template* – set email template to be sent if the error occurred.

## 4. Currency Auto Switcher

The extension allows to specify Country-Currency functionality and switch them automatically based on shoppers location.

### Currency Rates Configuration

Jump to *System – Manage Currency – Rates*.



USD	CAD	EUR	GBP	USD
0.9930	0.7694	0.6232	1.0000	

- In the field *Import Service* choose the appropriate provider for the currency rates.
- Then, hit the *Import* button to establish new exchange rates.
- Press *Save Currency Rates* button to finish the operation.

You can set currencies values ratio manually in relation to the base currency. Press *Save Currency Rates* button to confirm changes.

### Currency Symbols Configuration

Jump to *System – Manage Currency – Symbols*.

The module allows you to use the default currency symbols or change them to the custom ones.



Currency	Symbol*	Use Standard
GBP (British Pound Sterling)	£	<input checked="" type="checkbox"/>
CAD (Canadian Dollar)	CAS	<input checked="" type="checkbox"/>
EUR (Euro)	€	<input checked="" type="checkbox"/>
USD (US Dollar)	\$	<input checked="" type="checkbox"/>

Unmark the *Use Standard* field for the needed currency and change symbol manually.

Press *Save Currency Symbols* button to confirm changes.

## Currency Relations Configuration

This section lets specify Country-Currency relations.

Jump to *System – Manage Currency – Relations*.



ID	Currency	Countries*	Reset
1	GBP	GB <a href="#">Change</a>	<input type="checkbox"/>
2	CAD	CA <a href="#">Change</a>	<input type="checkbox"/>
3	EUR	AD, AT, AX, BE, CY, DE, ES, FI, FR, GF, GP, GR, IE, IT, LU, MC, MQ, MT, NL, PM, PT, RE, SI, SK, SM, TF, VA, YT, EU <a href="#">Change</a>	<input type="checkbox"/>
4	USD	AS, EC, FM, GU, HT, IO, MH, MP, PA, PR, PW, SV, TC, UM, US, VG, VI <a href="#">Change</a>	<input type="checkbox"/>

Add a new currency and set a list of countries for which this currency should be applied.

After configuration hit the **Save Currency Relations** button.

**Note!** Currency Auto Switcher switches only the displayed currency. All the transactions will be processed in the *Base Currency*.

## 5. GeoIP Detection

The extension allows you to check geographical location for online customers. To do this jump to *Customers – Online Customers*.

IP Address – shows the latest users IP address.


IP Location – shows users last location based on the GeoIP database.



ID	First Name	Last Name	Email	IP Address	IP Location	Session Start Time	Last Activity	Type	Last Url
From: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			From: <input type="text"/>	From: <input type="text"/>	<input type="text"/>	<input type="text"/>
To: <input type="text"/>						To: <input type="text"/>	To: <input type="text"/>		
n/a	Guest	n/a	n/a	75.119.214.227	US, United States, CA California, Brea, 92821	Oct 28, 2009 10:27:17 AM	Oct 28, 2009 10:44:47 AM	Visitor	http://geoip.magendo.com/

Alternatively, jump to *Sales – Orders* and select any of the placed orders.

Order # 100000001 | Jun 7, 2013 3:01:21 AM [Back](#) [Send Email](#) [Credit Memo](#)

Order # 100000001 (the order confirmation email was sent)		Account Information	
Order Date	Jun 7, 2013 3:01:21 AM	Customer Name	John Smith
Order Status	Complete	Email	<a href="mailto:john.smith@smithcompany.com">john.smith@smithcompany.com</a>
Purchased From	Main Website Main Store English - Default Theme	Customer Group	NOT LOGGED IN
Placed from IP	208.76.55.196  US, United States		

Billing Address <a href="#">Edit</a>	Shipping Address <a href="#">Edit</a>
John Smith Address City, Virginia, Zip United States T: 12345	John Smith Address City, Virginia, Zip United States T: 12345

*Placed from IP* block shows the location fro, where the order has been placed.

## 6. Support

### GOT QUESTIONS?

MageWorx offers FREE lifetime support and updates for any extension developed for Magento.

Need help with the extensions? Feel free submit a ticket from <http://support.magemorx.com>

### GETTING HELP WITH MAGENTO

MageWorx offers outstanding services developing custom tailored solutions for Magento platform to attain your eCommerce objectives.

Our professional impassioned team provides profound and custom oriented development of your project in a short timeframe. You are most welcome to contact us at [sales@magemorx.com](mailto:sales@magemorx.com)