

Technical Resource: How to Request Multicurrency

Log in to your Salesforce Org to obtain your Org ID

1. **Browse to:** Salesforce.com and login with your Org credentials
2. **Org ID:** Select "Setup" from your UserID drop-down list at the top of the page
3. From the "**Administration Setup**" menu on the left, expand "Company Profile" and select "Company Information"
4. In "**Organization Detail**" (top half of your screen) there is a "Salesforce.com Organization ID" field with your Org ID - copy this

Request Multi-Currency by logging a support case with SFDC*

*Note: Multi-Currency can take 24-48 hours to turn on once the request is made.

1. Click "**Help & Training**" (top of page) to go to Salesforce.com
2. Click "**Contact Support**"
3. Click "**Open a Case**" to open a New Case
4. Fill in the fields as follows:

I need assistance with: CRM

Product Topics: Limits & Feature Activations

Subject: Need Multi-Currency Turned On

Description: Please turn on Multi-Currency for my production Org.

Org ID: <your Org ID here>

Steps to Reproduce: Please turn on Multi-Currency for my production Org.

Severity Level: Level 4 - Medium

Business Impact: 1) What % of your users are affected? - **0%**

2) Does this affect data integrity? - **No**

3) Do you have a viable workaround? - **No**

4) Does this affect critical application functionality? - **No**

5) What business functionality are you unable to perform? - **Install**

FinancialForce.com PSA

5. Click "**Next**" to submit the case.
6. You will receive an automatic email indicating that your case has been received

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7. Within 24 hours you will receive an email from a Service Rep asking the **following questions**:

- What is the Organization ID of the production or sandbox instance (please specify if sandbox or production) where you need the feature to be activated? (**Navigate to Setup > Company Profile > Company Information**)
- You **must be** an active system administrator authorized on behalf of this organization to request this feature, please specify the username you are using for this organization. If you are a partner logging this case on behalf of a customer, please also grant login access for 3 days as a proof of authorization (please note that support is not going to use the login access for this activation but is just to validate the request).
- Please confirm that you understand that once multi-currency is activated, it **CANT** be deactivated? (we encourage testing this first in a trial/DEV org or a sandbox)
- Please confirm the **date and time** (including timezone) you would prefer this activation to take place.
- Please confirm that you **consent** to the lockout of this org for a certain period of time as described below (please note that there estimations are only indicative)?
- Please note that activating the multi-currency feature will stamp all existing records with one currency code that will be the default currency stamp you have selected. This organization default can be altered after the process is completed, but will only impact existing records if done so through record updates. Have you set the default currency to the desired value? (This can be done by navigating to **Setup > Profile > Company Information > Edit > Currency Locale**)

Please review the supported currencies and ISO codes in the article "Supported currencies" and confirm the ISO code you select.

- Have you followed the click path below and allowed support to activate multi-currency checking the box? **Setup > Administration Setup > Company Profile > Company Information > Populate "Allow Support to Activate Multiple Currencies" > Save.**

By enabling this check box, you are acknowledging that you are ready for multi-currency to be activated, but does not override the designated date/time for activation.

Please review the below article and confirm that you are aware of the implications in the article below to ensure a smooth transition for your organization:

https://help.salesforce.com/apex/HTViewHelpDoc?id=admin_enable_multicurrency_implications.htm&language=en_US