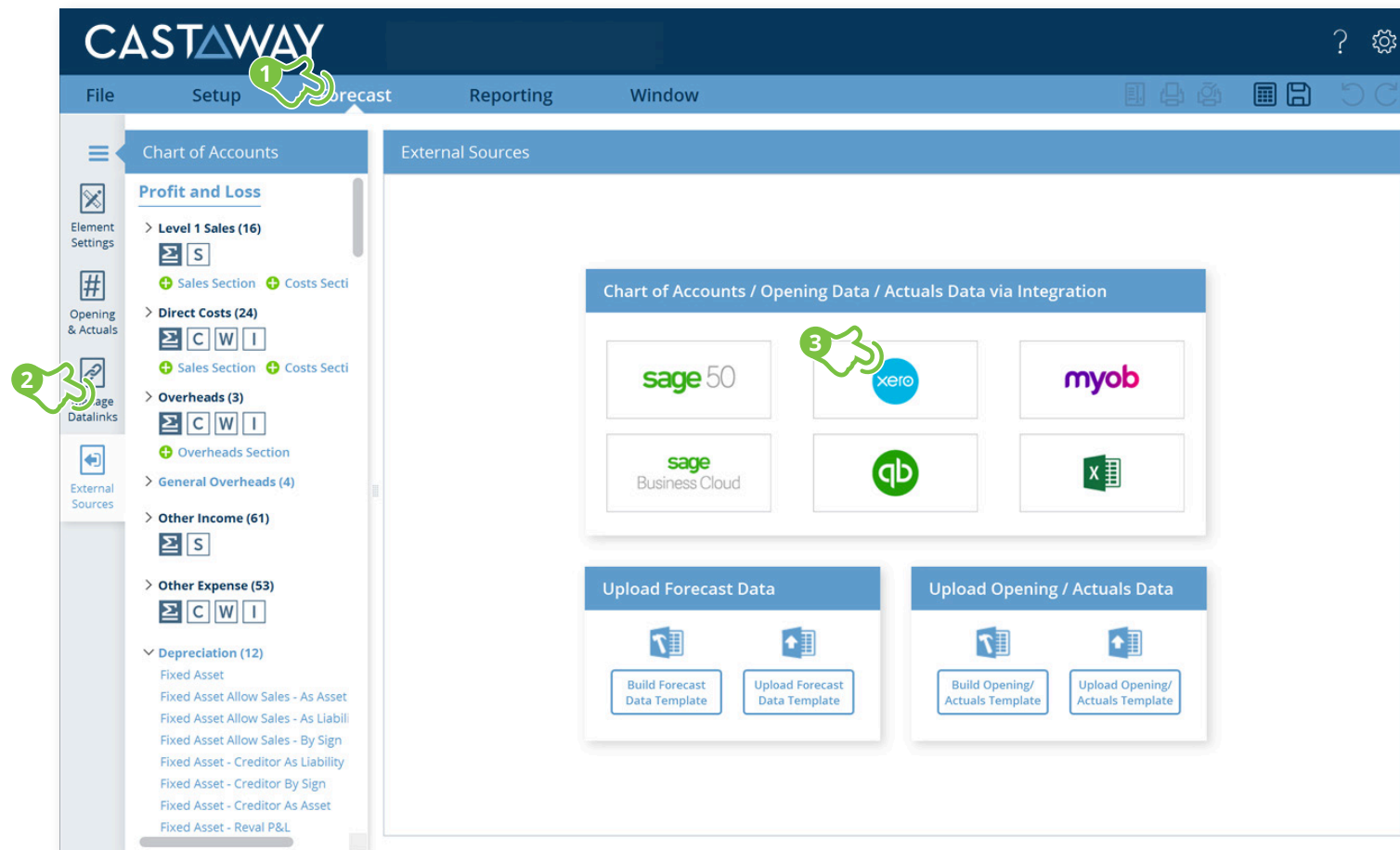


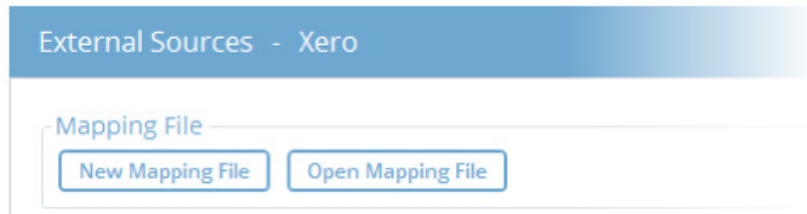
1. Accessing Integrations

Open Integrations by going to **Forecast > External Sources** and clicking on the **Launch** button under the **Xero** logo.



2. Create or Open a Mapping File

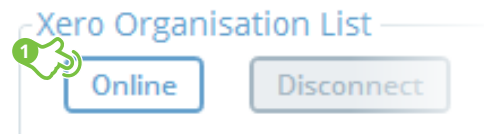
Choose to create a **New Mapping File** or open a previous **Mapping File**.



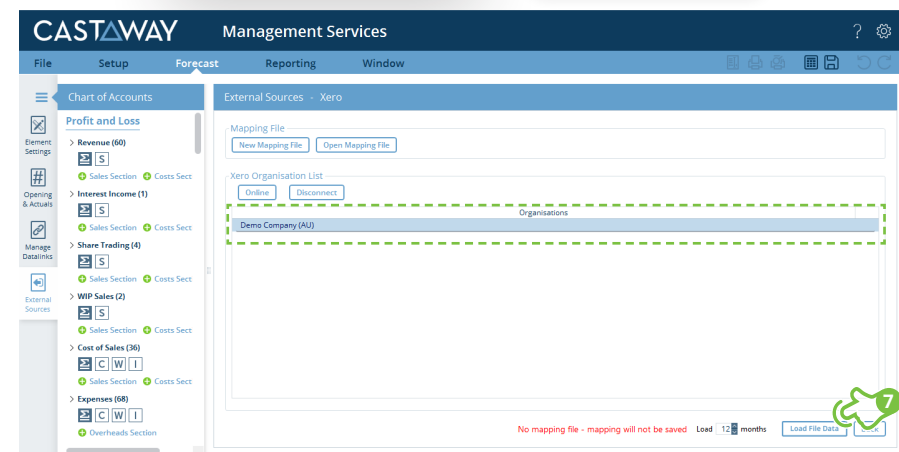
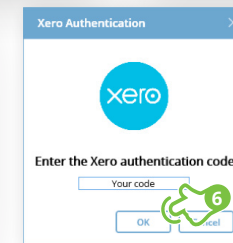
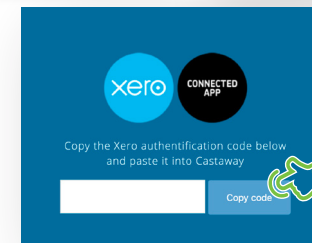
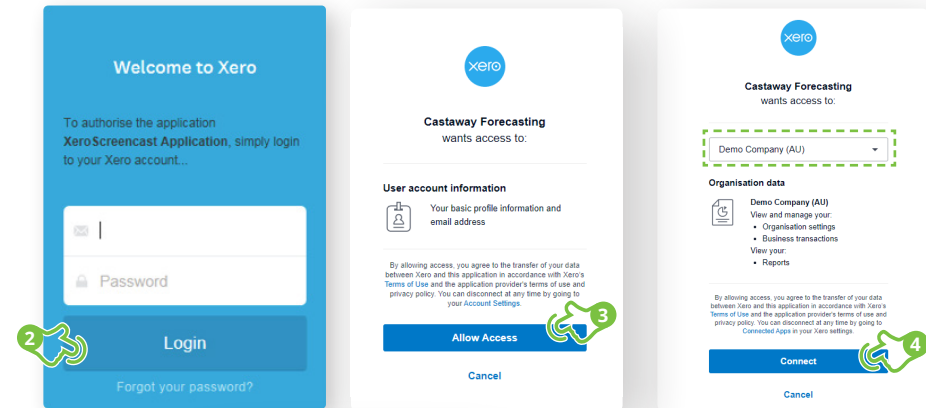
3. Select the number of months

Once the Mapping File has been identified, You need to select the number of months you want to import from **Xero**.

4. Connect to Xero & select the Xero file



1. Click **Online** to start the **Xero** login process
2. Enter your **Xero** logon details
3. Click **Allow Access**
4. Select the **Xero** Organisation & **Click Connect**
5. Copy the **Xero** authentication code
6. Paste the **Xero** authentication code into the **Xero Authentication** screen and click **OK**
7. Select your **Xero** Organisation & **Click Load File Data**



5. Map the Xero accounts to Castaway

The **Xero** data screen appears with the **Xero** accounts across 5 tabs:

Each tab shows the number of accounts in 3 categories:

(M)apped

Accounts successfully mapped

(A)rchived

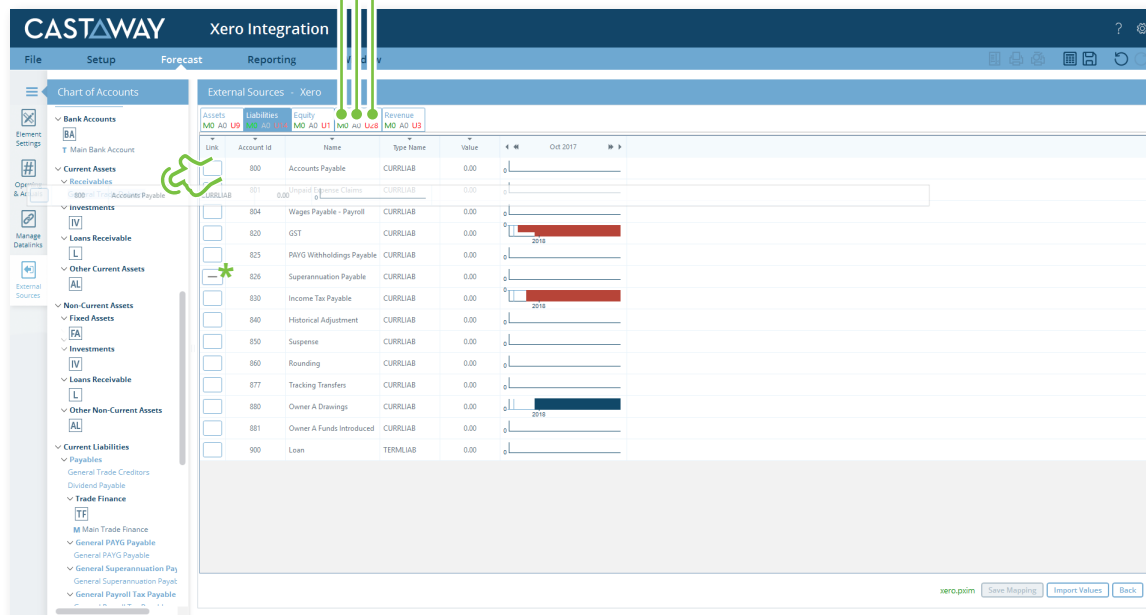
Accounts purposely not mapped

(U)nmapped

Accounts not yet mapped

Using drag & drop, you can map:

- ✓ one **Xero** account to an existing **Castaway** account
- ✓ multiple **Xero** accounts to an existing **Castaway** account
- ✓ one **Xero** account to a new **Castaway** account
- ✓ multiple **Xero** accounts to a new **Castaway** account
- ✓ multiple **Xero** accounts to multiple new **Castaway** accounts



Note: A Mapping File (*.pxim file extension) records how the **Xero** Chart of Accounts maps across to the **Castaway** Chart of Accounts. Mapping Files can be used and updated every time you want to import data into **Castaway** from **Xero**.

Drag & drop the account(s) to the **Castaway** Chart of Accounts:

Existing: Drag & drop the **Xero** account(s) over the account name.

New: Drag & drop the **Xero** account(s) over the element button.

Archive: Shows an account has been considered but does not need to be mapped to **Castaway**. *Click the button in the Link column and it will show a line.

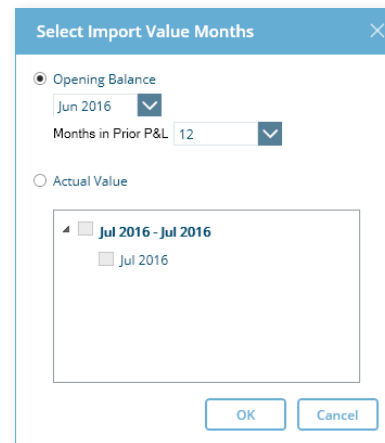
5. Import Values (Opening Balances)

Once the **Xero** accounts have been mapped you can import opening balance sheet and prior Profit & Loss data from the **Xero** file.

1. Click the **Import Values** button to launch the Select Import Value Months screen



2. Select the **Opening Balance** month from the drop-down list and set the number of months data required in the prior Profit & Loss



3. Click **OK** to save the mapping file, save any changes to the **Castaway** Chart of Accounts and import the selected opening data

Note: If you have enabled Actuals in your **Castaway** file, you can import Actuals data from **Xero** for one month or multiple months.

You might also be interested in: [Actuals](#)