CASTAWAY

1. Accessing Integrations

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

2. Create or Open a Mapping File

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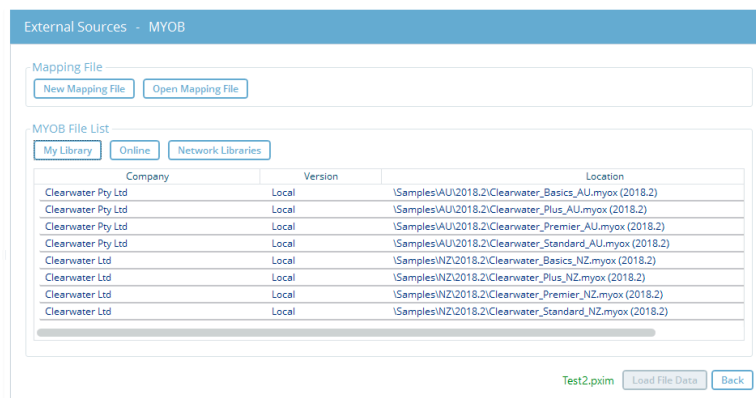
Mapping File

[New Mapping File] [Open Mapping File]

Tip: We recommend saving the **Mapping File** in the same folder location as the **Castaway** file.

3. Select the MYOB AccountRight Live file

Once the Mapping File has been identified, generate the **MYOB** File List. Choose from **My Library**, **Online** (login required)***** or **Network Libraries**. Select your **MYOB** file and Click on **Load File Data**.
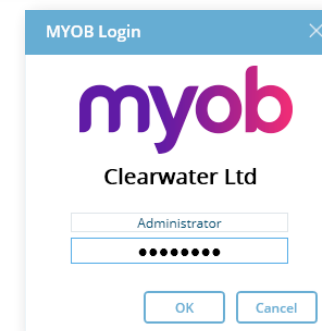
The MYOB file list appears. Select the **MYOB** file you want to work with and click **Load File Data**

Enter the **username** and **password** for the file and click **OK**.

*If you are using an Online file, you will first need to login to your **MYOB** account by adding your **my.MYOB** login details to the **MYOB** Sign in screen.

4. Map the MYOB AccountRight Live accounts to Castaway

The **MYOB** data screen shows the **MYOB** accounts list across 8 tabs. Each tab shows the number of accounts in 3 categories:

(M)apped
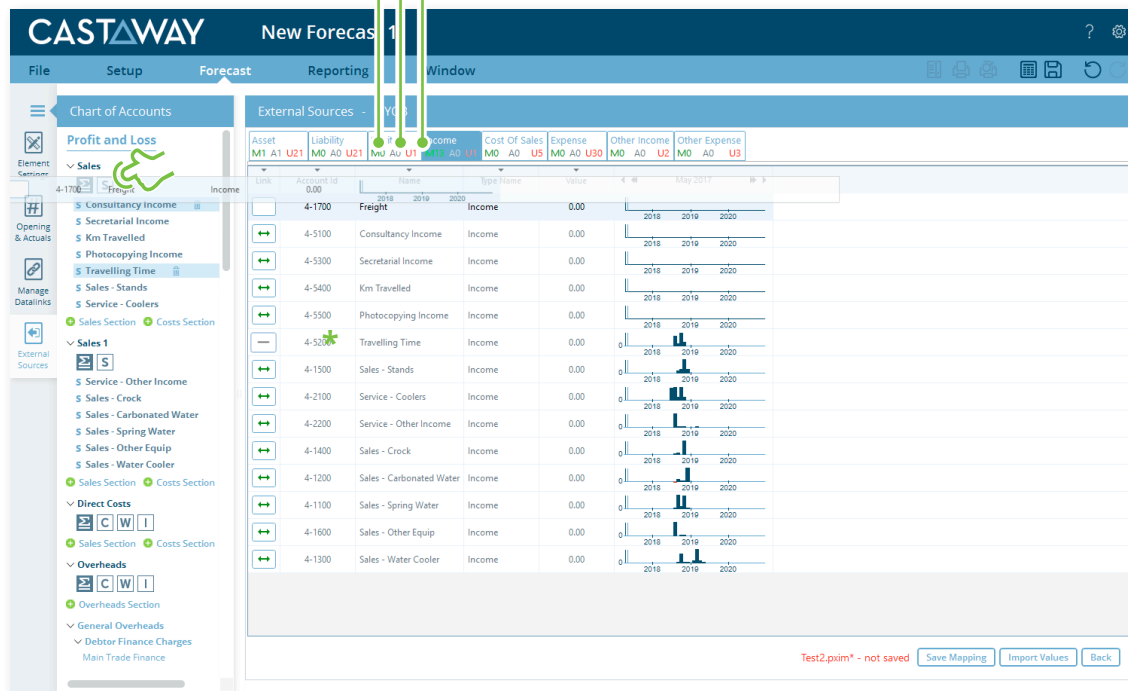Accounts successfully mapped

(A)rchived
Accounts purposely not mapped

(U)nmapped
Accounts not yet mapped

Using drag & drop, you can map:

- ✔ one **MYOB** account to an existing **Castaway** account
- ✔ multiple **MYOB** accounts to an existing **Castaway** account
- ✔ one **MYOB** account to a new **Castaway** account
- ✔ multiple **MYOB** accounts to a new **Castaway** account
- ✔ multiple **MYOB** accounts to multiple new **Castaway** accounts

Note: A Mapping File (*.pxim file extension) records how the **MYOB** 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 **MYOB**.

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

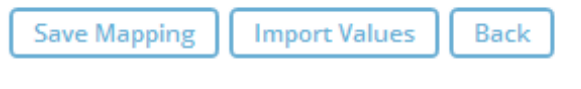**Existing:** Drag & drop the **MYOB** account(s) over the account name.

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

Archive: Shows an account has been considered but doesn't need to be mapped to **Castaway**. *****Click** the button in the Link column and it will show a line.
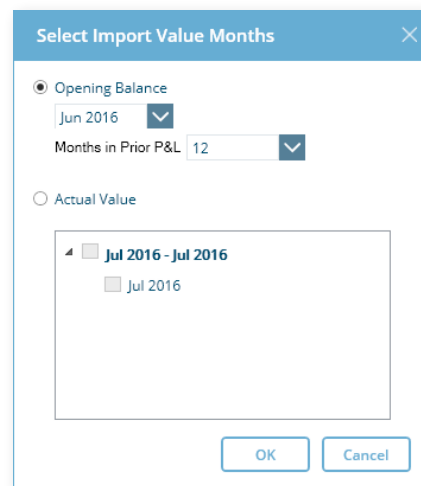
5. Import Values (Opening Balances)

Once the **MYOB** accounts have been mapped you can import opening Balance Sheet and prior Profit & Loss data from the **MYOB** file.

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

   | Save Mapping | Import Values | Back |

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

   Select Import Value Months

   ⦿ Opening Balance
   Jun 2016 ⌄
   Months in Prior P&L 12 ⌄

   ◯ Actual Value

   ▲ ☐ **Jul 2016 - Jul 2016**
   　　☐ Jul 2016

   OK   Cancel

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 **MYOB** for one month or multiple months.

ⓘ You might also be interested in:
Actuals

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