

1. Accessing Integrations

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

The screenshot shows the CASTAWAY software interface. The top navigation bar includes 'File', 'Setup', 'Forecast', 'Reporting', and 'Window'. The left sidebar is titled 'Chart of Accounts' and lists various account categories like 'Profit and Loss', 'Level 1 Sales (16)', 'Direct Costs (24)', 'Overheads (3)', 'General Overheads (4)', 'Other Income (61)', 'Other Expense (53)', and 'Depreciation (12)'. The 'External Sources' section is highlighted in the sidebar. The main content area is titled 'External Sources' and displays a grid of integration options: 'sage 50', 'xero', 'myob', 'sage Business Cloud', and 'qb'. Below this grid are two sections: 'Upload Forecast Data' and 'Upload Opening / Actuals Data', each containing 'Build' and 'Upload' buttons. Green callout boxes with numbers 1, 2, and 3 highlight the 'Forecast' menu, the 'External Sources' sidebar item, and the 'myob' logo respectively.

2. Create or Open a Mapping File

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

Mapping File

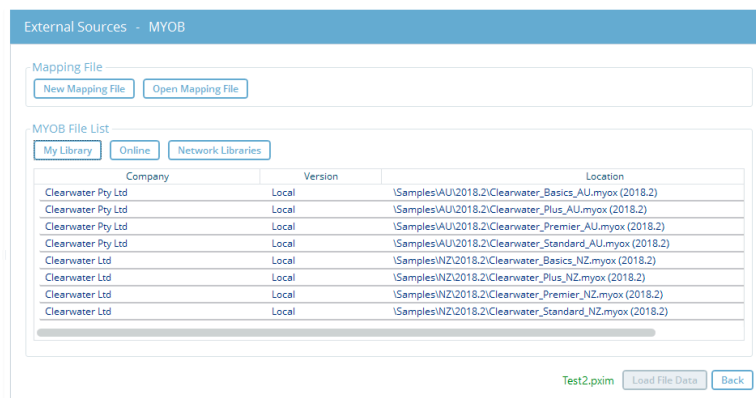
New Mapping File

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**.

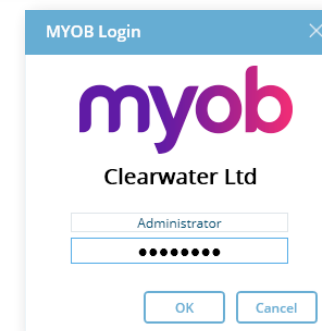


The MYOB file list appears. Select the **MYOB** file you want to work with and click **Load File Data**



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

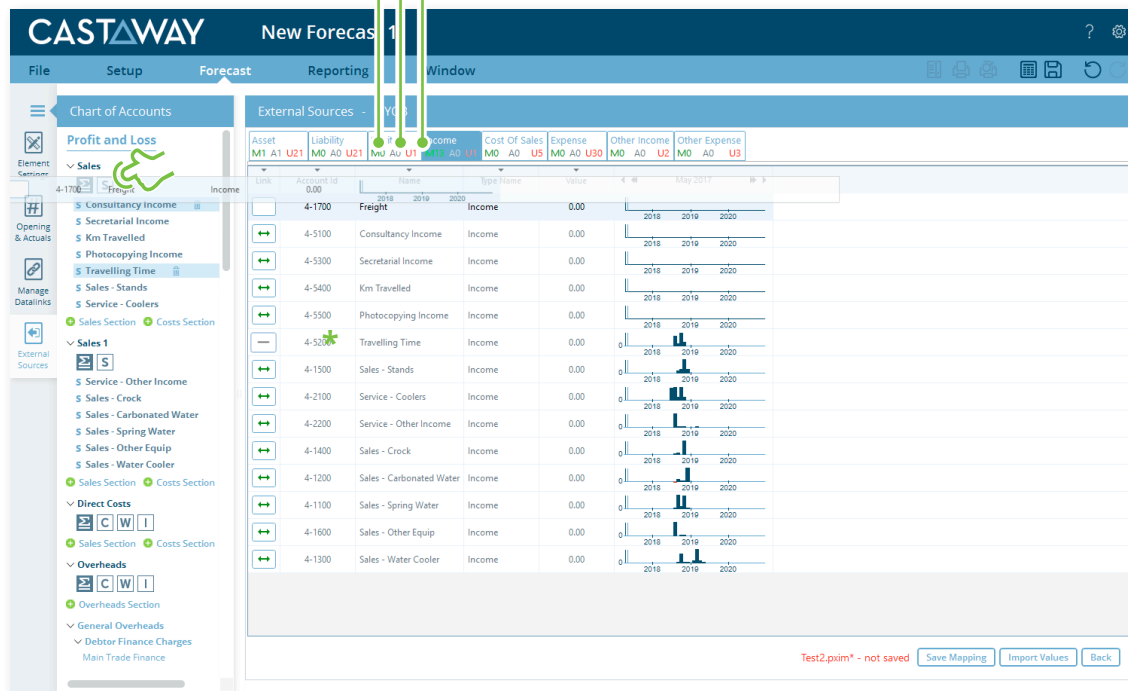
Accounts purposely not mapped

(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.

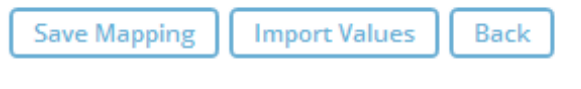
New: Drag & drop the **MYOB** account(s) over the element button.

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.

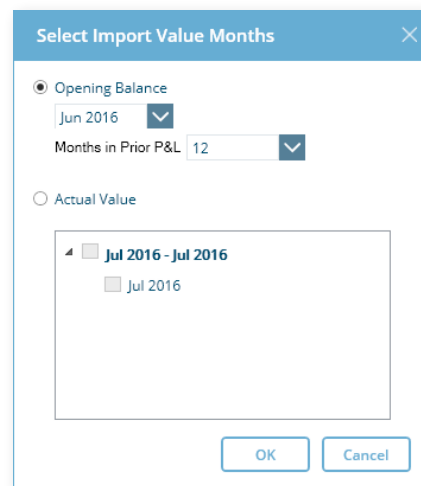
5. Import Values (Opening Balances)

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



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

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