

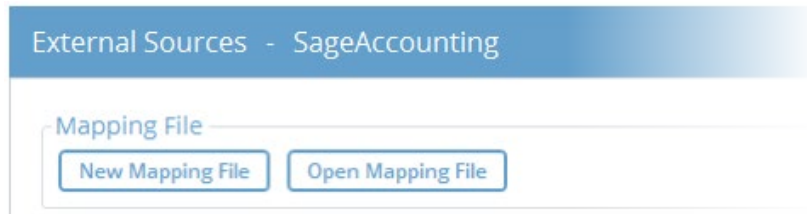
1. Accessing Integrations

Open Integrations by going to **Forecast > External Sources** and clicking on the **Sage Business Cloud** Launch button.

The screenshot shows the CASTAWAY software interface. The top menu bar includes 'File', 'Setup', 'Forecast', 'Reporting', and 'Window'. A sidebar on the left is titled 'Chart of Accounts' and lists various categories: 'Profit and Loss' (Level 1 Sales, Direct Costs, Overheads, General Overheads, Other Income, Other Expense, Depreciation), 'Element Settings', 'Opening & Actuals', 'Manage Datalinks', and 'External Sources'. The 'External Sources' section is highlighted with a green callout box labeled '2'. The main area is titled 'External Sources' and contains a section 'Chart of Accounts / Opening Data / Actuals Data via Integration' with a grid of integration options: 'sage 50', 'xero', 'myob', 'sage Business Cloud', and 'qb'. The 'sage Business Cloud' option is highlighted with a green callout box labeled '3'. Below this grid are two sections: 'Upload Forecast Data' and 'Upload Opening / Actuals Data', each with 'Build' and 'Upload' buttons. A green callout box labeled '1' points to the 'Forecast' menu item.

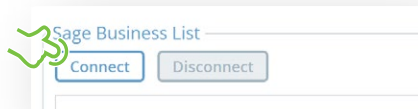
2. Create or Open a Mapping File

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

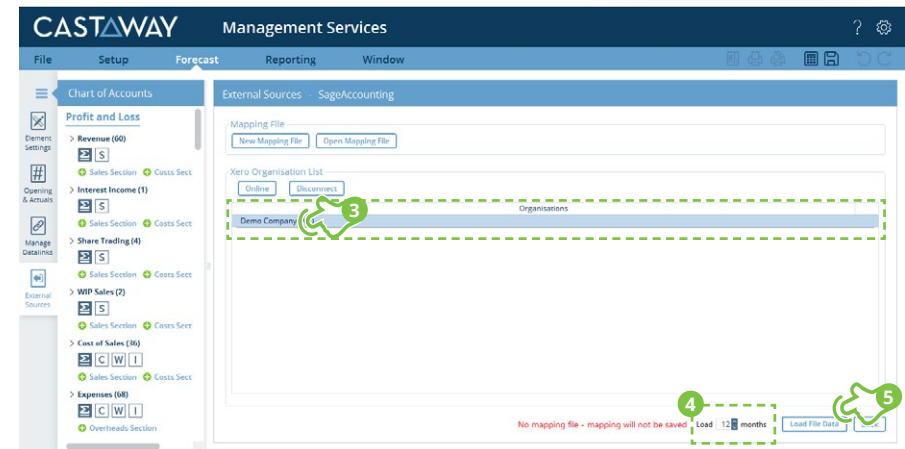
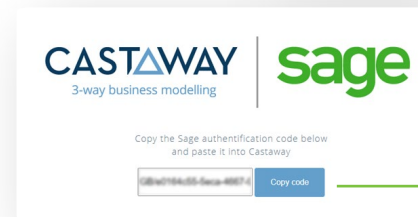
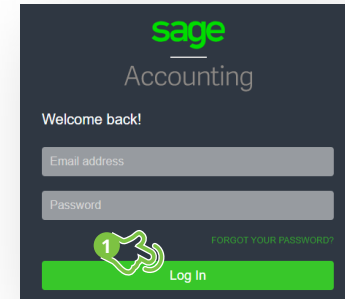


4. Select the Sage Business Cloud File

Click **Connect** to start the **Sage Business Cloud** login process:



1. Enter the logon details to the **Sage** webpage & click **Log in** to authorise access
2. Copy the authentication code then paste the code into the Sage Authentication screen and click **OK**
3. Select the organisation you want to work with
4. Select the number of months you want to import
5. Click **Load File Data**



5. Map the Sage accounts to Castaway

The **Sage** data screen appears with the **Sage** accounts across 5 tabs:
Each tab shows the number of accounts in 3 categories:

(M)apped

Accounts successfully mapped

(A)rchived

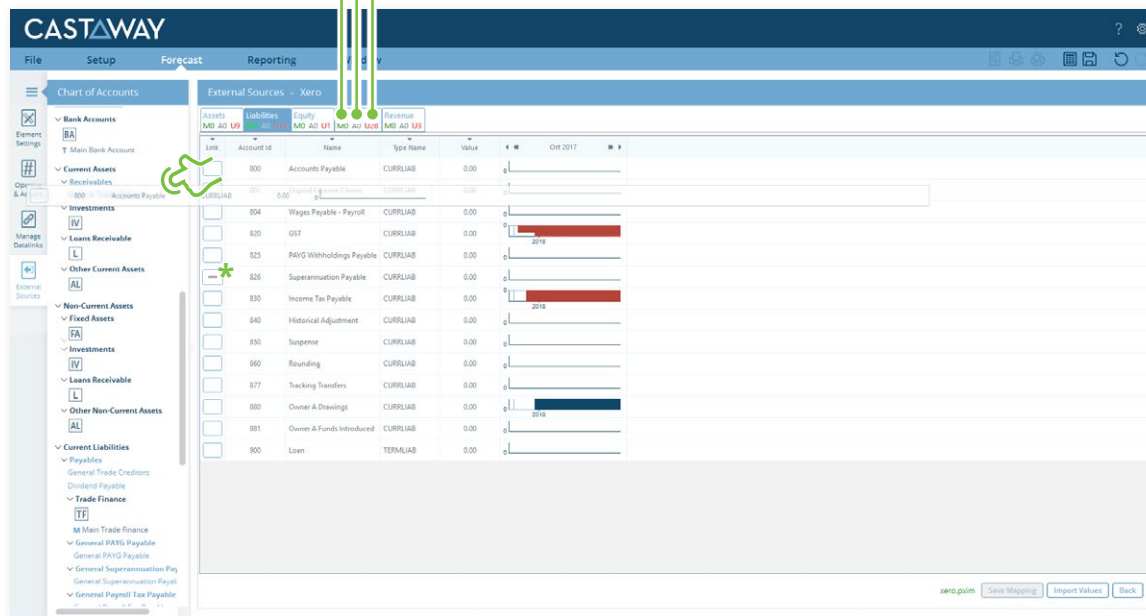
Accounts purposely not mapped

(U)nmapped

Accounts not yet mapped

Using drag & drop, you can map:

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



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

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

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

New: Drag & drop the **Sage** 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.

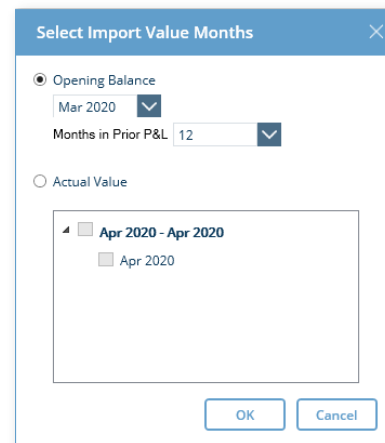
6. Import Values (Opening Balances)

Once the **Sage** 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 **Sage** for one month or multiple months.

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