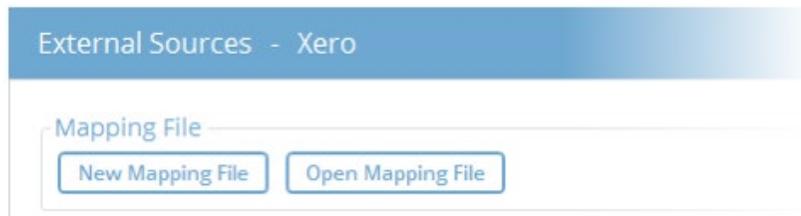## 1. Accessing Integrations

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**.

External Sources - Xero

Mapping File

| New Mapping File | Open Mapping File |

Tip: We recommend saving the **Mapping File** in the same folder location as the **Castaway** file.
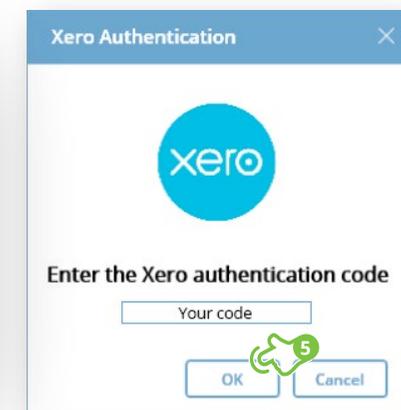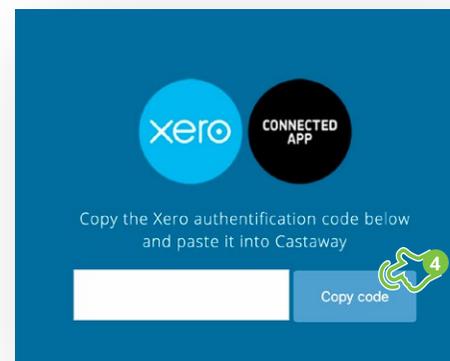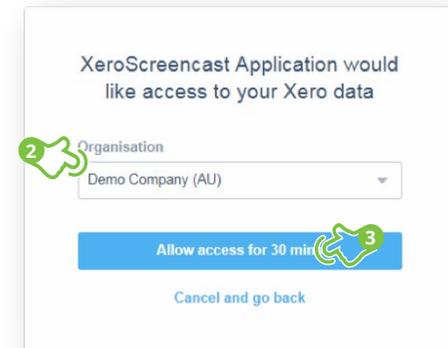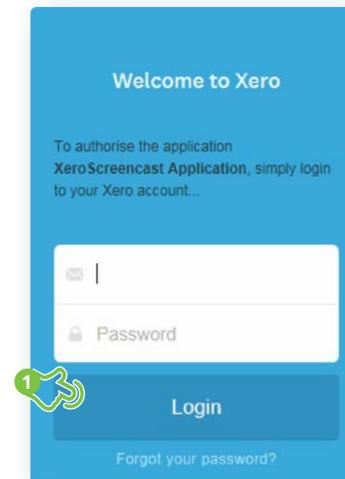
3. Select the number of months

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

4. Select the Xero file

Click **Load File Data** to start the **Xero** login process:

1. Enter logon details to the Screencast application

2. Select the **Xero** Organisation you want to work with

3. Click **Allow access for 30 mins**

4. Copy the **Xero authentication code**

5. Paste the **Xero authentication code** into the **Xero Authentication screen** and click **OK.**

Welcome to Xero

To authorise the application
XeroScreencast Application, simply login
to your Xero account...

✉ |

🔒 Password

Login

Forgot your password?

XeroScreencast Application would
like access to your Xero data

Organisation
Demo Company (AU)

Allow access for 30 min

Cancel and go back

xero CONNECTED APP

Copy the Xero authentification code below
and paste it into Castaway

Copy code

Xero Authentication

xero

Enter the Xero authentication code
Your code

OK   Cancel

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
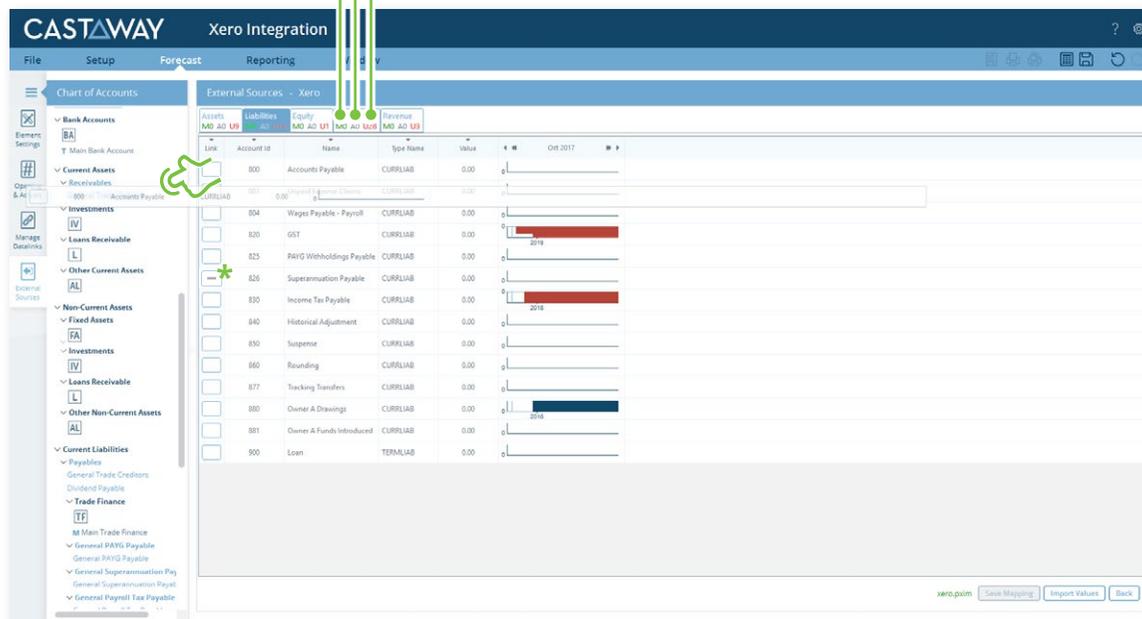
(A)rchived
Accounts purposely not mapped

(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.
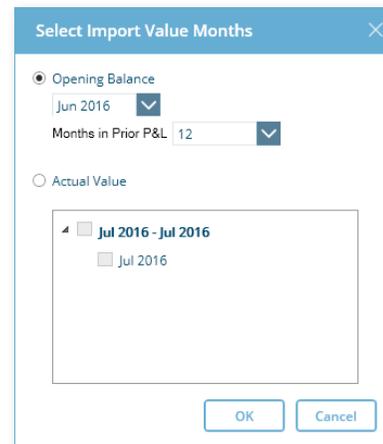
3

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

You might also be interested in:
Actuals