

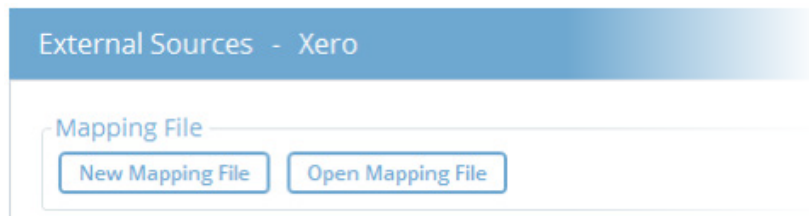
1. Accessing Integrations

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

The screenshot displays the CASTAWAY software interface for 'Samplers Wine Company'. The top navigation bar includes 'File', 'Setup', 'Forecast', 'Reporting', and 'Window'. The left sidebar shows a 'Chart of Accounts' menu with options for 'Profit and Loss', 'Local Wine Sales', 'Local Wine Costs', 'Imported Wine Sales', and 'Imported Wine Costs'. The main content area is titled 'External Sources' and contains a section for 'Chart of Accounts / Opening Data / Actuals Data via Integration'. This section features logos for 'myob', 'xero', and 'Microsoft Excel', each with a 'Launch' button. Below this are two sections: 'Upload Forecast Data' and 'Upload Opening / Actuals Data', each with 'Build' and 'Upload' buttons for templates. Green callout boxes with numbers 1, 2, and 3 highlight the 'Forecast' menu item, the 'External Sources' sidebar item, and the 'Launch' button for Xero, respectively.

2. Create or Open a Mapping File

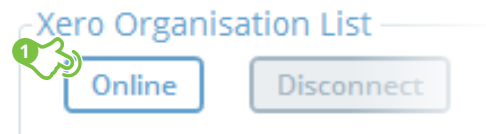
Choose to create a **New Mapping File** or open a previous **Mapping File**.



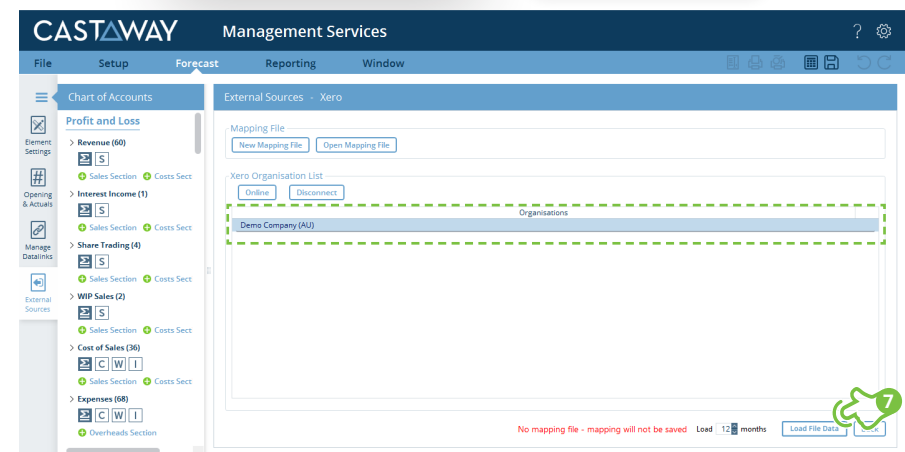
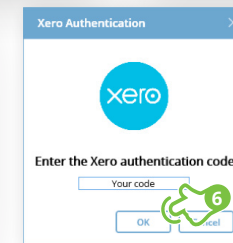
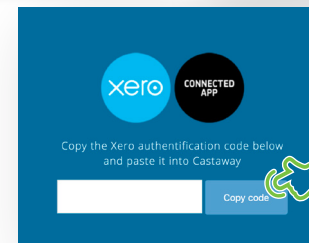
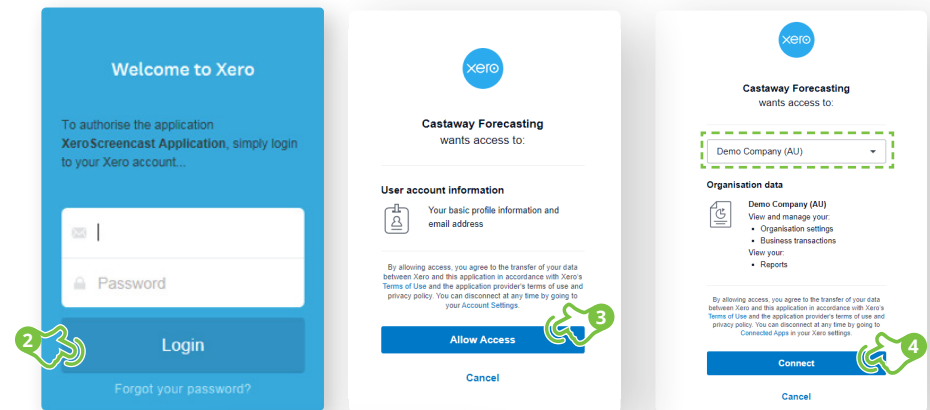
3. Select the number of months

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

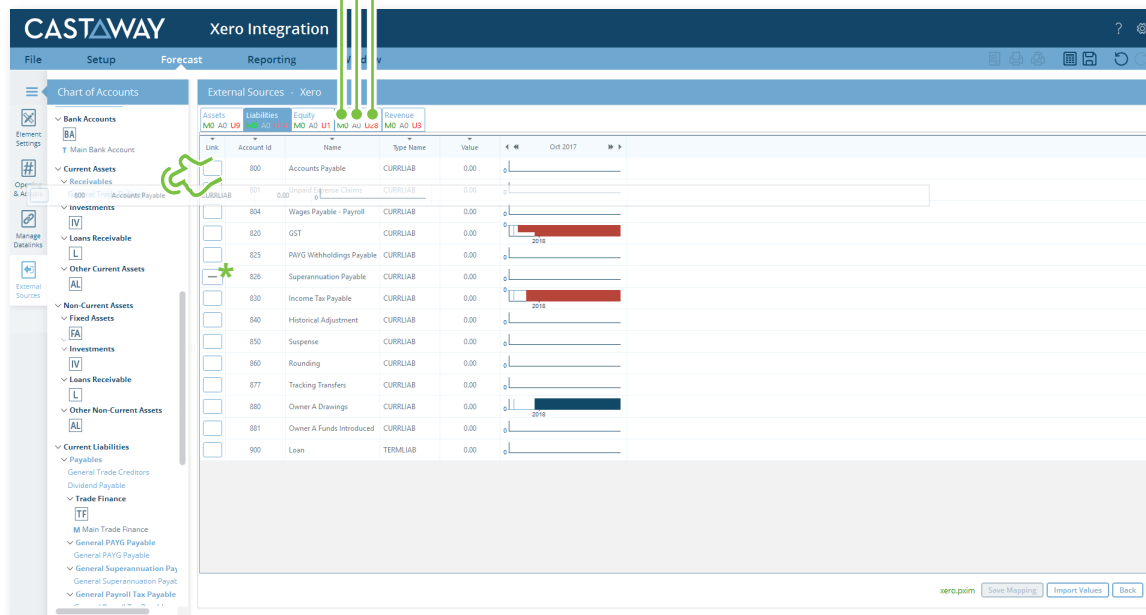
Accounts purposely not mapped

(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.

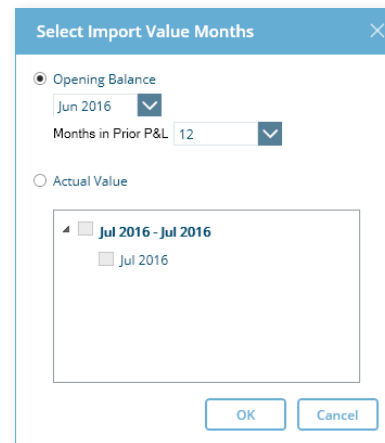
5. Import Values (Opening Balances)

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](#)