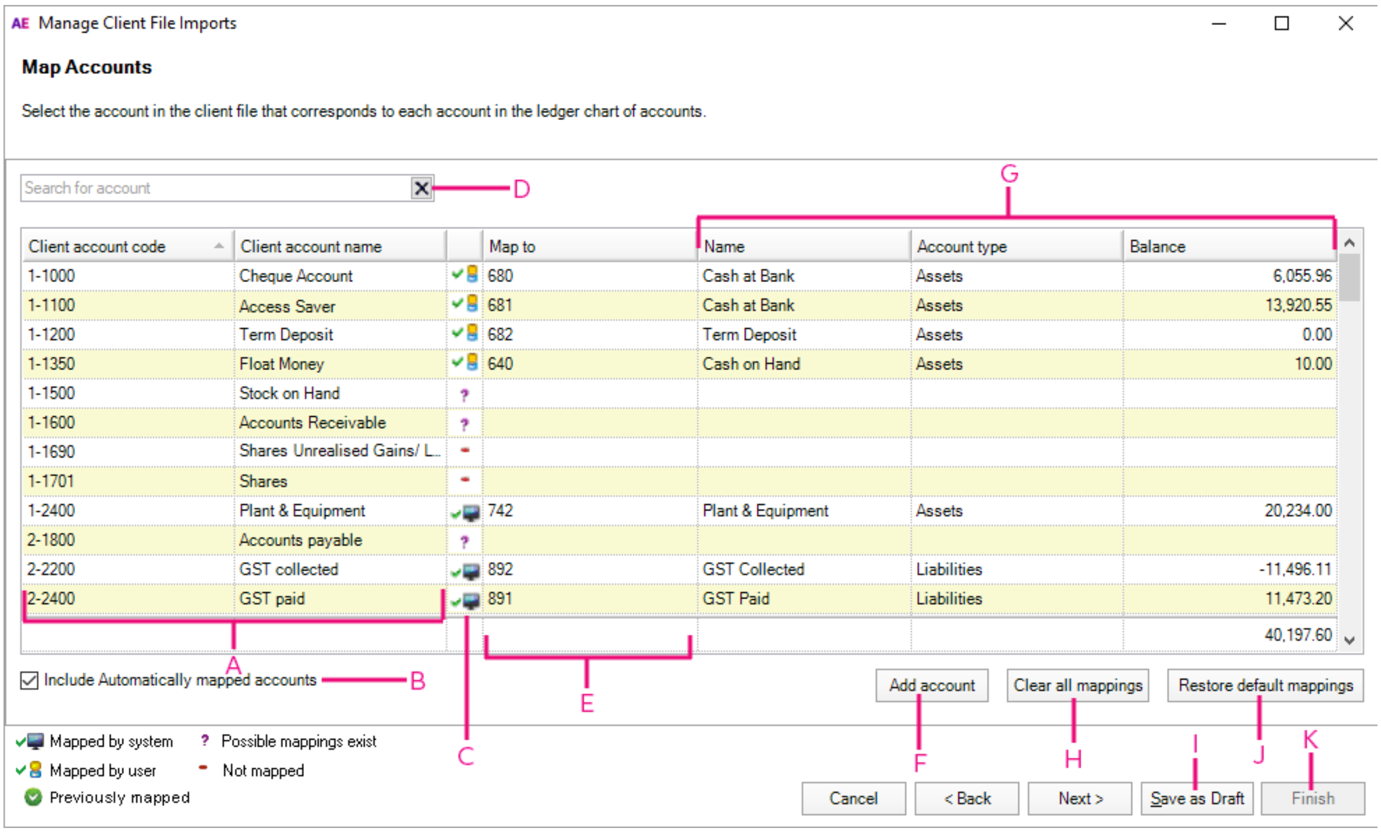
Mapping imported accounts

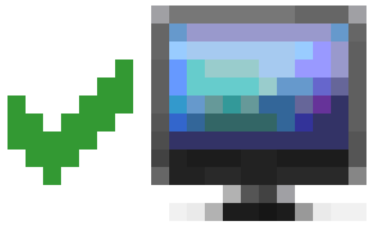
If you ticked the checkbox to map the client accounts, the **Map Accounts** window will open. The **Map Accounts** window enables you to select the account(s) on the Practice ledger chart that correspond to each account on the accountant's chart. You can make adjustments to the ledger accounts, where required, to align the balances with the equivalent accountant's accounts.

Any GST columns in the imported file will be ignored. Make sure to add any GST data manually.

Map accounts window



	Button / Field	Description
A	Client account code / name	These columns represent your client's chart of accounts. They're populated with the data in the Account code and Account name columns of the file you've selected to import in stage 1 of the import wizard.

B	Include Automatically mapped accounts	Select this checkbox to display all accounts automatically mapped by the system (indicated with  in the status column). This option is selected by default. If the system has mapped the account incorrectly, choose the correct account by clicking in the **Map to** column for the account, and choosing the correct account.
C	Status	Displays the mapping status for each account. A legend for these icons is available on the bottom-left of the window.
D	Search for account	Enter an account code or name to search the client chart of accounts.
E	Map to	Click in the **Map to** column for each row and choose an account from your chart of accounts to allocate the balance of the client's account to. See **To map an accounts** below for a demonstration.
F	Add account	If you can't find the account you're looking to map to, create a new account by clicking the **Add account** button. In the **Add account** window, specify the **Account type**, **Account type group**, **Account number**, **Account name** and **Tax Code** for the new account. When finished, click **OK** to create the account.
G	Name, Account type, Balance	These columns represent the chart of accounts in your MYOB ledger. These fields are populated automatically when you select an account in the **Map to** column for the row.
H	Clear all mappings	Click this button to clear all mappings, including automatic system mappings and any manual mappings you have made. A confirmation window displays requesting confirmation to clear the mappings. Click **Yes**.
I	Save as Draft	Save your current mappings as a draft. When you reopen this window, your saved mappings will appear so you can continue where you left off.
J	Restore default mappings	Click this button to clear any changes you've made when mapping your accounts. This will restore the account mappings to their original state and any changes you've made will be lost. You confirmation window displays requesting confirmation to restore the default mappings.
K	Finish	This button becomes active once all accounts have been mapped.

To map an account

To create a new account

To view or edit the mapping template

Mapping FAQs

How does the system know which accounts to automatically map to?

Can I override a system mapped account?

Why can't I see all accounts when choosing an account to map to?

Related topics

Importing data

Importing an .MYE or .TXT file

Importing a .CSV file

Importing a Chart of Accounts

Importing a Bank Statement into MYOB Ledger

Using the QuickBooks 2014 template

Using the QuickBooks Online Template