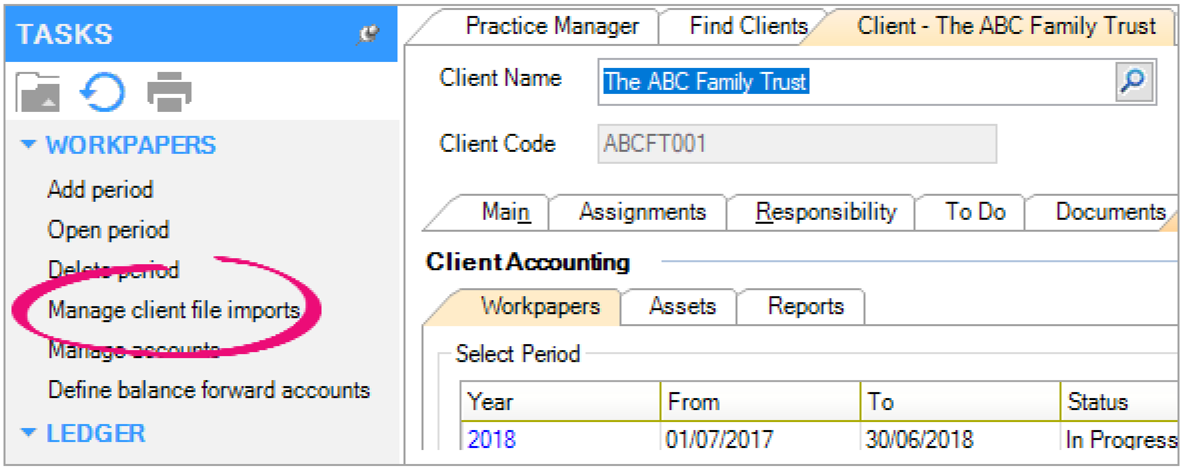
Importing data

Transactions can be imported into Client Accounting using the **Manage client file imports** wizard. You can find this function on the Tasks bar of your client's **Client Accounting** > **Trial Balance** (or **Workpapers**) tab.



You can only import transactions via Client Accounting if your configured ledger is an **MYOB Ledger**. If you're using something different, you can still use the import functions in your configured ledger's software.

The Manage client file imports wizard accepts the following file types:

- .MYE
- .TXT
- .CSV

About the Manage Client File Imports wizard

The Manage client file imports wizard is where you'll import journal transactions from your client's file into an MYOB ledger. In this window, you'll map your the client's accounts to its equivalent account in your ledger.

There are two additional functions in this window:

- The **View/edit mapping template** link lets you view and modify the mapping template for the most recently imported client accounts.
- The **Delete previous import** link will delete all transactions and journal entries posted by the import wizard for the previously imported client file (i.e. undo the import).

Transaction Import FAQs

How do I import data from another accounting software?

How do I export transactions from a AccountRight, AccountEdge or Essentials?

How do I import transactions if I'm not using an MYOB ledger?

What data can I import into MYOB Ledger?

Related topics
Mapping imported accounts 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