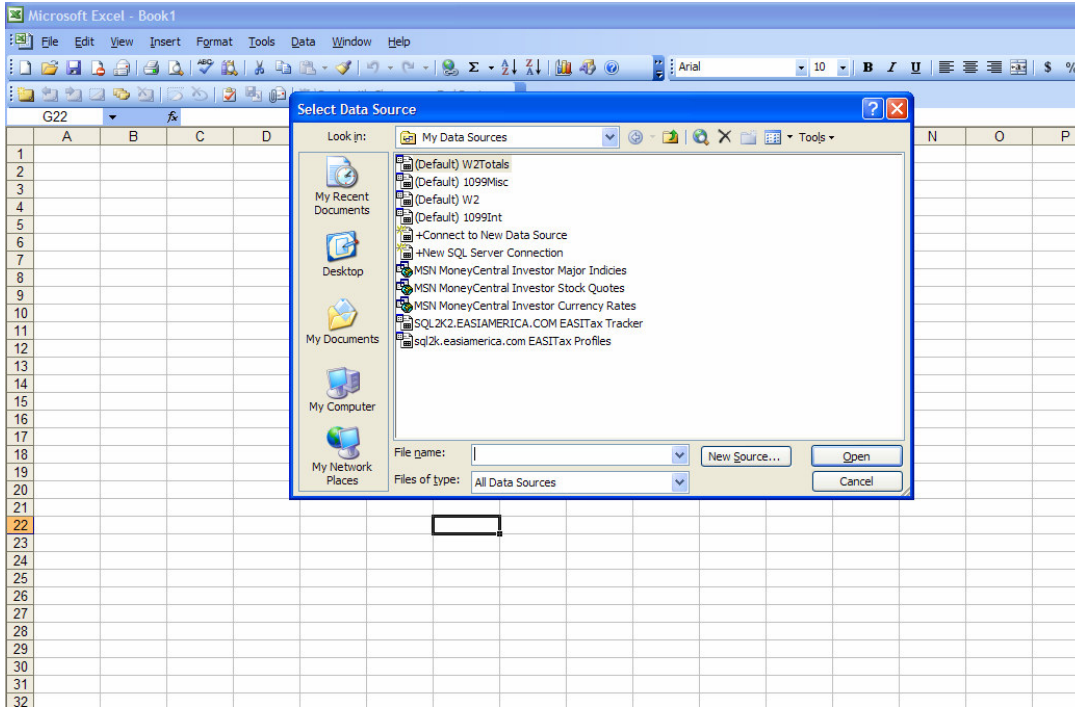


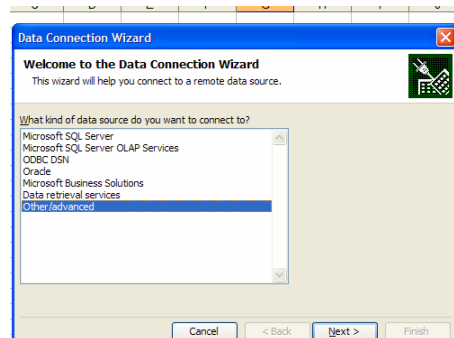
Exporting Data From EASITax 2006

There may be occasions when you want to look at data in a way that EASITax does not currently support. To accommodate this requirement, you can import the data you want into Excel from EASITax. This import capability put you in the driver's seat to sum data, sort data, alter data, or any other action you want to take. Below are the directions on how to make this happen.

1. Open a new Excel spreadsheet on your desktop.
2. From the menu bar select Data
3. Select Import External Data
4. Select Import Data



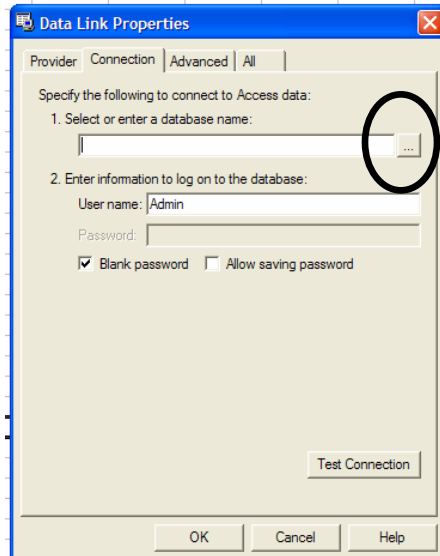
5. Above is the Select Data Source menu that will come up. From this menu choose 'Connect to New Data Source' and choose 'Open'.
6. This will launch a Data Connection Wizard that looks like the photo below:



7. This connection wizard will allow you to import your data into Excel.
 - a. Choose 'Other/Advanced' and hit 'next'
 - b. Choose Microsoft Jet 4.0 OLE DB Provider and hit 'next'

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- c. On the connections tab below #1 'Select or enter database name' click on the button to the right to browse your computer files.



- d. You will want to go to the following location to get the EASITax files C:\Program Files\EASITax\Solution\EASITax2006\Forms and select the file EASITax2006.mdb file. **Do not select EASITax2005Schema.mdb and you may not see the .mdb extension if your computer settings are set to not show them in that case just select EASITax2006.*
8. Once you select the file, you will be prompted to select what database table you want to import. For example: If you are working on 1099 MISC, then you would want to select 1099MISC from the selection list (*DO NOT select 1099MISCTotals*). Click next.
9. On the 'Save Data Connection File and Finish' you will most likely want to leave it set to the default settings shown on the screen. This option allows you to save the file in a location and with a name of your choosing. Click finish.

This opens your data in excel and you can then play with the data and see whatever combinations you wish. Some quick tips to viewing, sorting, and collecting data for easy manipulation in excel.

FILTER:

By being on a cell in a column of your data, you can go to 'Data, Filter, Auto Filter' which will place drop down options for each column header. This filter allows you to select criteria that you want to see all of the files for. This can be helpful in allowing you to view all records for a Payer or all records for a state, etc.

SORT:

By using the sort function you can sort your data and collect it by different values. Payer name, State, Totals, etc. This function will allow you to validate different data elements so that you can total data together. If you need to see the totals that you are submitting by state, you can sort by state and add up the totals for the state you want to validate.

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SUBTOTALS:

Use the subtotal feature to select what criteria to use to add subtotals for your data. If you want to see totals by Payer you can use this function. Select Data and Subtotals. This will bring up the subtotal selection criteria. It is critical to make sure your data is sorted by whichever criteria you want to have the subtotals done for. The data will automatically be sorted by Payer Name when you export it so if you want to subtotal by state, sort by state first and then perform this function. So you have sorted by 'Recipient State' on 1099 MISC. Select Recipient State from the drop down box for 'At Each Break In' to have your subtitles show there. If you want to sum the data select the sum function from the 'Use Function' criteria. Choose which columns to add subtotals to. If you want subtotals for state income tax withheld, select that column by placing a check in the box next to that column header. You can use the checkboxes or not, that is your choice. If you are manipulating data that was previously subtotaled then you should use the 'replace current subtotals' option. Click ok when complete and see your data subtotals.

DISCLAIMER:

These instructions are for information purposes only and if there are steps that are different for your computer or if they do not work, it does not indicate a failure in EASITax software. Each option detailed here was done using Microsoft Excel 2003 and earlier versions of the Excel program may require different steps or have different command names to produce the same results shown above.