

1120S COLUMNAR K-1 EXPORT

The Columnar K-1 Export tool allows you to export data from the 1120S Schedule K-1s screens in the federal Tax Forms view. The information **cannot** be imported back into the 1120S returns.

In addition to Columnar Review for 1120S, you have the capability to export all activity information (for example, Pass-Through, Rental Real Estate, etc.).

USING COLUMNAR K-1 EXPORT

To create an export, make sure that your login ID for RS Browser does not contain **any** spaces.

1. In RS Browser, select the **Returns Processing** tab.
2. Then select **Import/Export > Export** from the left menu.
3. Select *Columnar K-1* from the drop-down box.

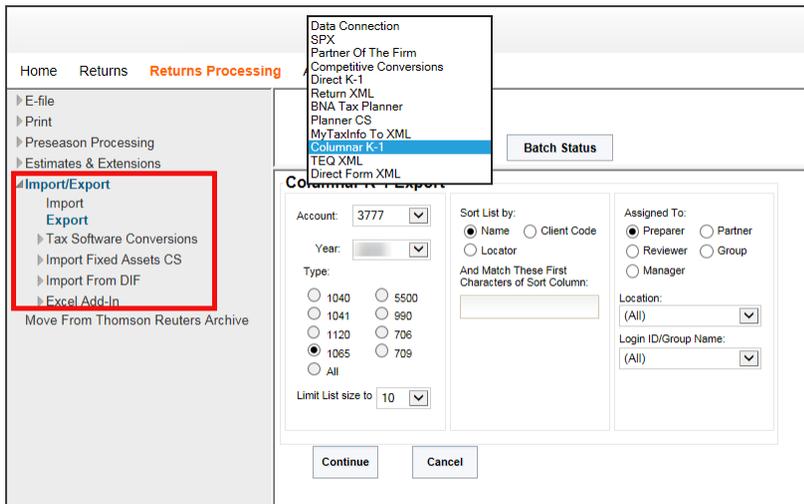


Figure 1

2 **1120S Columnar K-1 Export**
Using Columnar K-1 Export

4. A window opens below the Columnar K-1 choice. Choose additional criteria as needed (**Account**, tax **Year**, tax **Type**, and **Sort** criteria). Then click **Continue**.

The screenshot shows a web application interface with a top navigation bar containing 'Admin', 'Reports', and 'Support'. Below this is a header for 'Columnar K-1 Export' with a dropdown menu set to 'Columnar K-1' and a 'Batch Status' button. The main configuration area is titled 'Columnar K-1 Export' and contains several sections: 'Account' (3777), 'Year' (dropdown), 'Type' (radio buttons for 1040, 1041, 1120, 1065, All, 5500, 990, 706, 709), 'Sort List by' (radio buttons for Name, Client Code, Locator), 'Assigned To' (radio buttons for Preparer, Partner, Reviewer, Group, Manager), 'Location' (dropdown), 'Login ID/Group Name' (dropdown), and 'Limit List size to' (500). A 'Continue' button is highlighted with a red box.

Figure 2

5. A warning screen is displayed indicating a change will occur. Click the **Continue** button.

The screenshot shows a 'Charge Warning Dialog -- Webpage Dialog' window. It features a question mark icon and the title 'Columnar K-1 Export'. The text inside reads: 'The Columnar K-1 Export process will incur a charge. Press Continue to perform Columnar K-1 Export. Press Cancel to exit and select a different export type.' Below the text are 'Continue' and 'Cancel' buttons, with the 'Continue' button highlighted by a red box. At the bottom, there is a checkbox for 'Do not show this dialog in the future.' and a note: 'Note: To enable this dialog again, click the Enable Charge Warning Dialog button on the User Preferences page.'

Figure 3

6. A list of returns meeting your selected criteria appears.

Columnar K-1 Export
Returns Found in Account 3777:

Select	Return	Year	Account	Type	Taxpayer Name	Client Code	Completed	Assigned	Group
<input checked="" type="checkbox"/>	2102KI		3777	1120	1120 Column Partner Review	LLINADDIN			None

1 record returned.

Continue Select All Deselect All Cancel Next 10

Figure 4

7. Select returns from the list by clicking the check box, or click the **Select All** button. Click **Continue**.

8. You will see a status screen as shown below. To check the status, click the **Close** button.

Columnar K-1 Export

Firm	Account	Year	Tax Type
FT	3777		1120

Locator	Status
2102KI	Export Queued

Export Batch job: 64872
1 returns queued
0 returns rejected

Close

Figure 5

9. You will return to the criteria selection screen but in this instance click the **Batch Status** button.

The screenshot shows the 'Columnar K-1 Export' interface. At the top, there is a dropdown menu set to 'Columnar K-1' and a 'Batch Status' button highlighted with a red box. Below this, the main form is titled 'Columnar K-1 Export'. It contains several sections: 'Account' (3777), 'Year' (dropdown), 'Type' (radio buttons for 1040, 1041, 1120, 1065, All, 5500, 990, 706, 709), 'Sort List by' (radio buttons for Name, Client Code, Locator), 'Assigned To' (radio buttons for Preparer, Partner, Reviewer, Group, Manager), 'And Match These First Characters of Sort Column' (text input with '2102kl'), 'Location' (dropdown with '(All)'), and 'Login ID/Group Name' (dropdown with '(All)'). At the bottom, there are 'Continue' and 'Cancel' buttons, with 'Continue' highlighted by a red box.

Figure 6

10. Enter the **To (MM/DD/YYYY)** date in the **Date the Batch Submitted** section. Click **Continue**.

The screenshot shows the 'Batch Status' dialog box. It has a title bar 'Batch Status'. Below the title, there is a section 'Date Batch Submitted'. Under this section, there are two date input fields: 'From (MM/DD/YYYY):' with the value '8/30/' and 'To (MM/DD/YYYY):' with the value '8/30/'. At the bottom of the dialog, there are 'Continue' and 'Cancel' buttons, with 'Continue' highlighted by a red box.

Figure 7

11. Click the link in the **Batch ID** column for the export file you want to see.

Columnar K-1 Export Batches Found:

Date/Time	Tax Year	Tax Type	Items	Batch ID
		1120	1	64872

1 batch found.



Figure 8

12. Click the **Refresh** button to see the updated **Export Status**. Be aware that large export files may take longer.

Columnar K-1 Export

Export Status for Batch ID 64872:

NOTE: A Password input field indicates a password is required. These returns are not included in the Download All button. To download a password protected return when the 'Print File Ready' status is displayed, please enter the password and click on the return's hyperlink.

Return	Password	Entity Name	Export Status	WIP Status	Download Status
2102KI		1120 Column Partner Review	File Export Complete		WIPO

1 record returned.

Figure 9

13. When the **Export Status** column indicates *File Export Complete*, then click the **Download All** button.

Columnar K-1 Export

Export Status for Batch ID 64872:

NOTE: A Password input field indicates a password is required. These returns are not included in the Download All button. To download a password protected return when the 'Print File Ready' status is displayed, please enter the password and click on the return's hyperlink.

Return	Password	Entity Name	Export Status	WIP Status	Download Status
2102KI		1120 Column Partner Review	File Export Complete		WIPO

1 record returned.

Figure 10

14. A message is displayed at the bottom of the screen to open or save the ZIP export file. Click the down pointing arrow next to **Save** to **Save**, **Save as**, or **Save and Open**.



Figure 11

15. If you select **Save as**, browse to a location for the download, and then click **Save**.
16. A message confirms that the download process is complete. Click **Open**, **Open folder**, or **View Downloads**.



Figure 12

17. Click **Open** to view the ZIP file and the export file. The export file will be named as follows:
- **1065**: *.PX1
 - **1120**: *.CX1

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