

HOW TO UPDATE THE SALES TAX REPORT PIVOT TABLE WHEN YOU HAVE RENAMED THE FILE AND THE REPORT POINTS TO THE ORIGINAL FILE INSTEAD OF THE RENAMED ONE

Often, when an Excel file containing a pivot table report is renamed, the pivot table information in the new file will still point to the original file data and not the new file data, so the link needs to be redirected to the new file.

FOLLOW THE STEPS BELOW TO UPDATE THE DATA LINK

Step 1: Access the Sales Tax Data Worksheet in the Template

1. Point your mouse to the monthly tabs anywhere along the bottom.
2. Right click and select 'Unhide'
3. Select 'Sales Tax Data'. This will unhide the source sheet that the pivot table uses. (This source sheet holds every sales tax cell from all the months).

Step 2: Find the Data Source Link

1. On the Sales Tax Report worksheet click your left mouse button into cell B7 'Sales Tax on Income' to select it.
2. On the menu across the top of Excel, find and select 'Analyze' and look for 'Change Data Source' icon.
3. Select that 'Change Data Source' icon > 'Change Data Source' > under the *Table/Range* it should be pointing to the 'Sales Tax Data' worksheet you opened in Step 1 above with 'marching ants' around all the Sales Tax on Income data (cells A3 to D1803). **OR**
4. It might be pointing to the original template.

Step 3: Amend the Link

1. If it is linked to the wrong workbook or not linked to anything at all, then you need to link it to those cells mentioned (A3 to D1803) in your new workbook.
2. Select the *Table/Range* field and then select all the columns and rows for *Income* only
3. Refresh your Sales Tax Report for Income and see if it is now showing correctly.
4. Follow all instructions above for Sales Tax on Expenses (Cells F3 to I1803)