Instructions

The Schedule D Import utility can import information from Excel 97-2003, Excel 2007/2010 or later, TAB (Tab delimited) and CSV (Comma delimited) files. To ensure that the transaction information is imported correctly, the spreadsheet must contain all of the columns as they appear in the example below. Each column represents a field on the Schedule D screen. For more information click on the 'Help' button.

Example Spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	TSJ	F	State	City	Date Sold	Date Acquired	Proceeds	Cost	Fed W/H	Wash Sale	Type	Description	Loss Not Allowed
2	T		NC		10/8/2011	1/13/2011	$4,645.00	$582.00				100 SHS ABC Stock	
3	S		NC		5/9/2011	2/10/2005	$950.00	$2,932.00				200 SHS Microsoft	
4	J		NC		12/5/2011	3/21/2009	$4,847.00	$3,129.00				200 SHS Apple Inc	
5	T		NC		11/1/2011	9/19/2007	$1,545.00	$4,299.00				100 SHS ABC Stock	

Formula Bar

	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Basis Not Reported	Adj 1 Code	Adj 1	Adj 1 AMT	Adj 2 Code	Adj 2	Adj 2 AMT	Adj 3 Code	Adj 3	Adj 3 AMT	AMT Cost Basis	US Real Property
2												
3												
4												
5												