

# How to Use The Import Button on Schedule 8949/1099-B

Sat, Apr 15, 2023 [1040Online](#), [Desktop Program](#), [Hosted Program](#)

## Step 1: Create an Excel spreadsheet with the information to be imported

The format of the spreadsheet should be as follows:

	A	B	C	D	E	F	G	H	I	J
1	Close Date	Rec Type	Open Date	Security	Shares Sold	Proceeds	Cost	Adj Amt G	Adj Code I	Adj Code J
2										
3										

Use the following to copy/paste to your CSV file to create the template, or see below for template.

**NOTE:** The first row needs to contain the exact text above. If this row is missing, the top row of data will not be imported. If there is different text in this row, an error will occur when the data is imported, but the import will still proceed.

The letter in red for the image below shows what fields correspond to the Columns in the Excel example, so 'D' would correspond to Column D, which is 'Security'

Box A-F	(a) Description of property	(b) Date acquired	(c) Date sold	ST/ LT	(d) Sales price	(e) Cost Basis	Adjust to G/L (f) Code (g) Amt	(h) Gain or (Loss)
TS								
	<b>D</b>	<b>C</b>	<b>A</b>		<b>F</b>	<b>G</b>	<b>I J</b>	<b>H</b>

## Naming Conversions for the Top Row


- **Close Date** = Sales Date, Sold Date, etc.
- **Rec Type** = Record Type, Stock Order Type, Transaction Description, etc.
- **Open Date** = Purchase Date, Acquire Date, Bought Date, etc.
- **Security** = **Stock Name**, Security Name, etc.
- **Shares Sold** = Quantity of Shares Sold, Number of Items Included in this Transaction, etc.
- **Proceeds** = Sales Price, Sold for Price, Amount Received from Transaction, etc.
- **Cost** = Purchase Price, Acquired Price, Bought for Amount, etc.

Save the spreadsheet as a **.csv** (comma delimited) file. Then **CLOSE** the spreadsheet.

## Step 2: Import the spreadsheet data

1. Open the tax return to which the data is to be imported.
2. On the top bar, click **Add Form**.
3. In the **Enter Schedule/Form Number** field, enter "8949."
4. Double click on the form to add it to the return.
5. At the top of the form, click on the **Import Button** at the top of the screen.



6. The **Import Stock Transactions** screen will open.
7. Click on the  button to open the **Select a File to Import** window.
8. Browse to the **.csv** file created in **Step 1** and select it.
9. Click on **Open** to import the file.  
If error populates click **OK** to complete import process
10. The information will be imported into the **8949**.

Online URL: <https://kb.erosupport.com/article-254.html>