

3. Import a CSV File from Excel

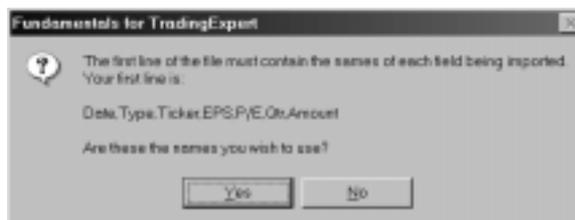
Fundamental data from an Excel spreadsheet can be imported into the *Fundamentals* application. The Excel work sheet containing the data must first be saved to the CSV (comma delimited) format.

↑ *To import a CSV file, follow these steps:*

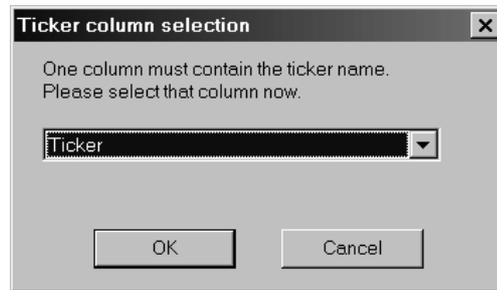
1. Open *Fundamentals for TradingExpert Pro*, from the menu bar select **Fundamentals**, and from the drop-down menu select **Import CSV File...** A dialog box titled *Import Fundamentals from CSV File* will appear.
2. Use the *Look in* list box, the *Up One Level* command button, and the icons in the main window to find and select the CSV file you wish to import.
3. With the CSV file selected in the main window and its name displayed in the *File name* box, click **Open**.



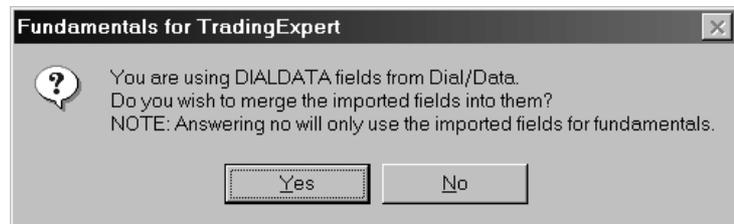
4. The screen that appears next lists the field names obtained from the first line of the file. If these names are acceptable, click **Yes**. If you do not want to accept the names, click **No** to abort the import and use Excel or a word processing program to make revisions.



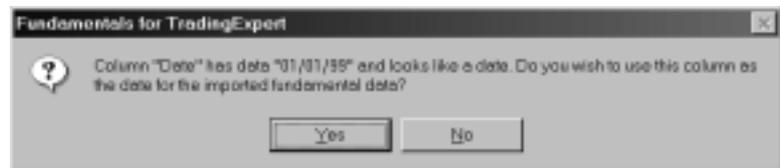
5. The next screen asks you to select the column containing the ticker name. Select the correct field from the list box and click **OK**.



6. The screen shown below appears next. Click **Yes** or **No** to answer the question to move to the next screen.



7. The final step in the setup procedure for the import of the file is to answer the question asked on the next screen. If you want to accept the date shown for the date of the imported fundamental data, click **Yes**. If not, click **No** to use the current date instead.



8. When the *Import complete* box appears, click **OK**.

