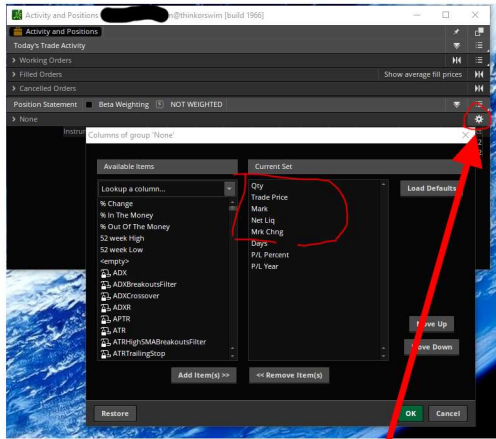# TD_Stock_Stalker Setup

Get Holdings File

1 Open *Think or Swim.* Under the monitor window, click settings on the '*positions and statements*' tab and set the first 5 to these in this order.


2 Click the *'notes'* button above the settings and select export to file. Save this as **holdings.csv** and put it in the main *TD_Stock_Stalker* directory. Make sure the arrow next to *None* is down and you can see the stocks and info. (The file only saves what you see here)
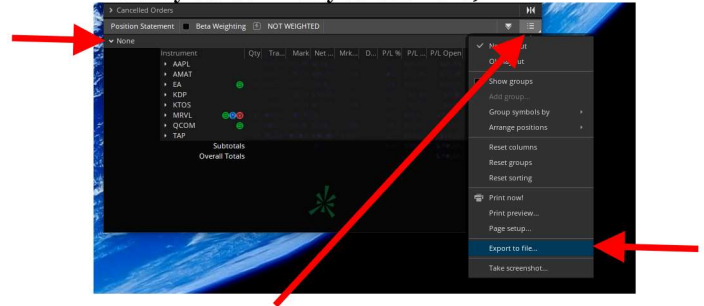

Get Trades File

1 Sign in to your TD account on the web page. Under 'my account' select transactions.

2 Select your time frame and download as .csv files. They only allow you to get 1 year at a time, so get a file for each year. **Make sure there are no duplicate trade files, or that you didn't capture the same trade in two files.**
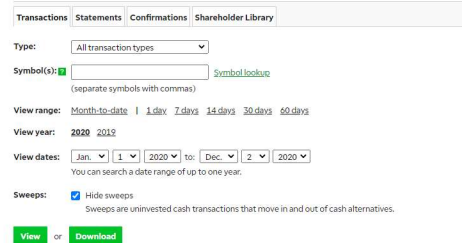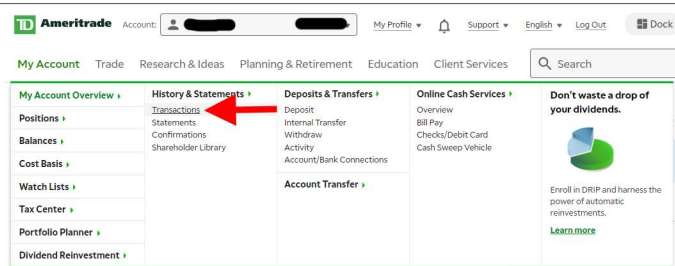
3 Put all the trade files (**not holdings.csv**) into the TradeFiles directory in the TD_Stock_Stalker parent directory:
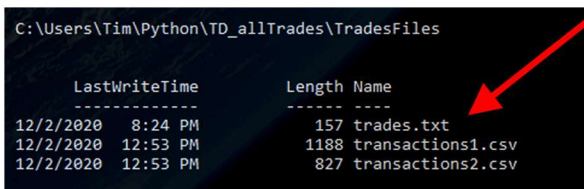
Tip: Save previous years' activity to a file and just update the file for the current year each time

Running the Program

When you have **holdings.csv** in the main directory and the trade files in the *TradesFiles* directory, run main.py to generate your Stock and Trade info.