



# **DIVCASTER**

## **Quickstart Guide**

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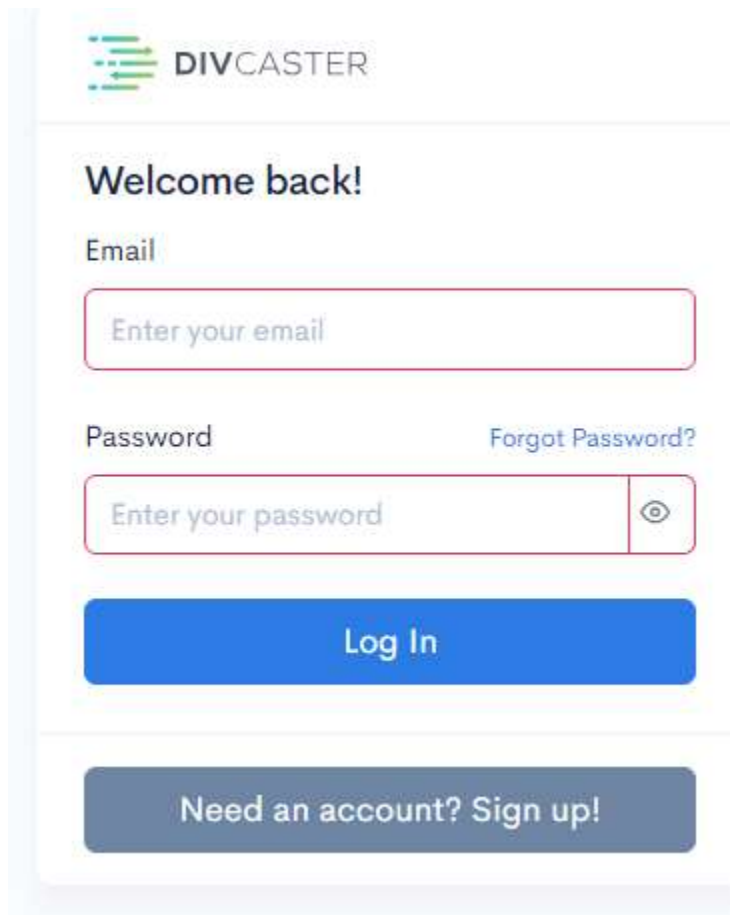
This quickstart guide will show you how to get started using Divcaster including

- logging in
- setting up for first portfolio
- importing data from your online brokerage account
- creating additional portfolios
- accessing other tools

This quickstart guide highlights the most basic features to get you running with your first portfolio. For additional features and more details on everything Divcaster offers be sure to review the Divcaster User Manual. You can find it [here](#).

## Logging In

To log in to Divcaster go to <https://divcaster.com> where you'll be prompted for your email address and password. This is the same email address and password you use to access any of your other subscriptions at Investors Alley. See image below.



The image shows a login form for Divcaster. At the top is the Divcaster logo, which consists of three horizontal bars in green, yellow, and blue, followed by the word "DIVCASTER" in a bold, sans-serif font. Below the logo is a horizontal line. Underneath the line is the text "Welcome back!". Below this is the "Email" label, followed by a text input field with the placeholder text "Enter your email". Below the email field is the "Password" label, followed by a text input field with the placeholder text "Enter your password". To the right of the password field is a link that says "Forgot Password?". To the right of the password field is also an eye icon. Below the password field is a blue button with the text "Log In". Below the "Log In" button is a horizontal line. Below the line is a dark blue button with the text "Need an account? Sign up!".

**DIVCASTER**

Welcome back!

Email

Enter your email

Password [Forgot Password?](#)

Enter your password

Log In

Need an account? Sign up!

## Setting Up Your First Portfolio

Upon your first login, you will have the choice to add your first transaction manually or to import transactions from your online brokerage account. The screen will be what appears below.

Manually adding your first couple of stocks is the best choice if you do not have a long history of transactions or just want to add a stock and get started right away and import your brokerage account data later.

**My Portfolio** Switch Portfolio

**This portfolio is empty!**

Get started below by adding a transaction, or if you have already have a CSV file from your broker, you can import it by [clicking here](#).

**Company**

Search by company name or symbol...

**Transaction Type**

BUY

**Quantity**

Enter the number of shares bought or sold

**Purchase Date**

01/14/2019

**Price**

\$ Enter the price paid per share ☐ Use last closing price

**Transaction Cost**

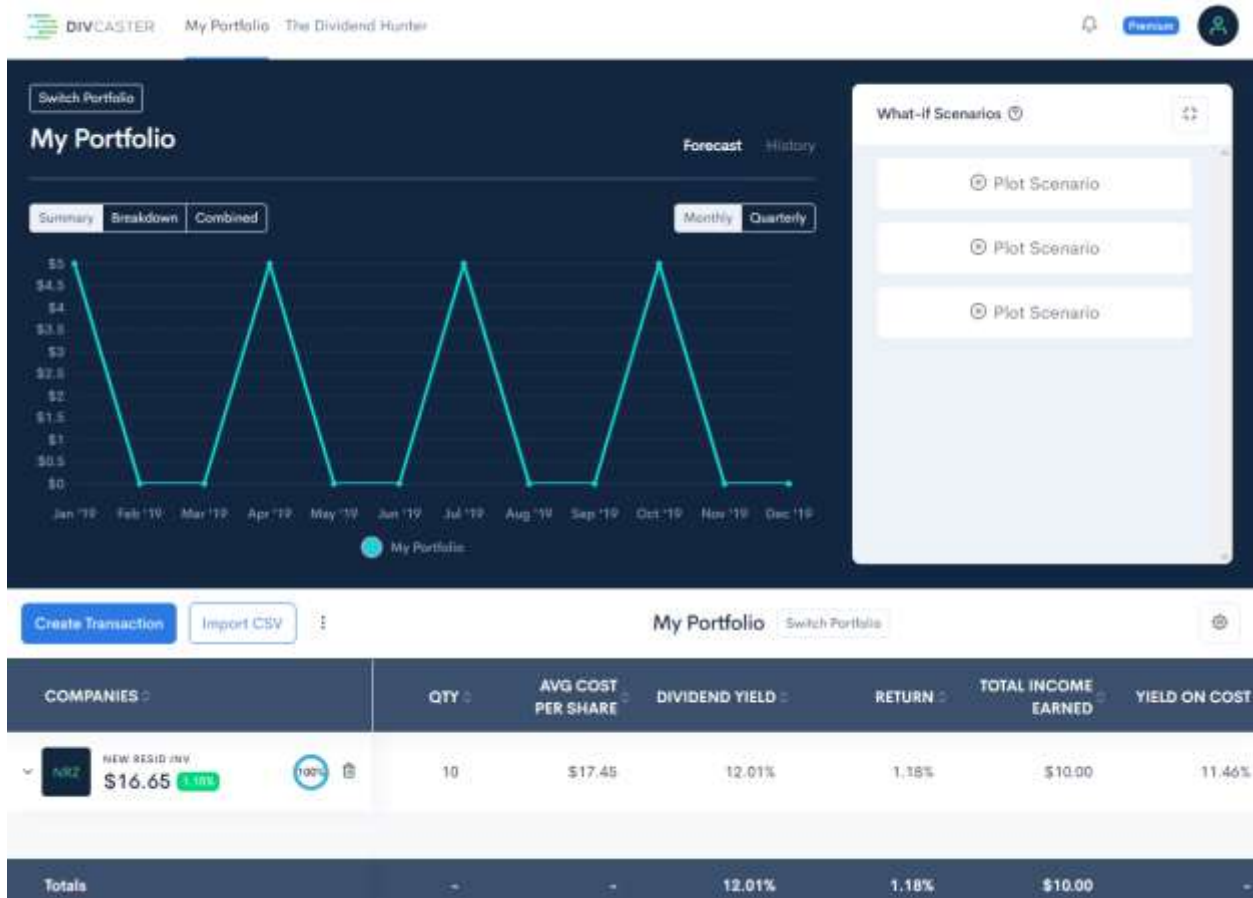
\$ Enter the total additional fees paid (optional)

**Add Transaction**

1. In the field for company start typing the company's ticker symbol or name. As you're typing you'll see options appear below, click on the appropriate one.

2. Select if this was a BUY or a SELL. This will usually be BUY as you'll likely use this tool for adding stocks.
3. Enter the quantity of shares bought or sold
4. Select the purchase date
5. Enter the price paid for share. Here you can include the actual price paid or have Divcaster just grab the last closing price for your stock. Most of the time you'll want to manually input this for accuracy.
6. Enter the transaction cost. This is optional and may be used in updated features of Divcaster.
7. Click "Add Transaction" button at the bottom

This will create your transaction and take you to the home screen. There will be one stock listed at the bottom as in the image below.

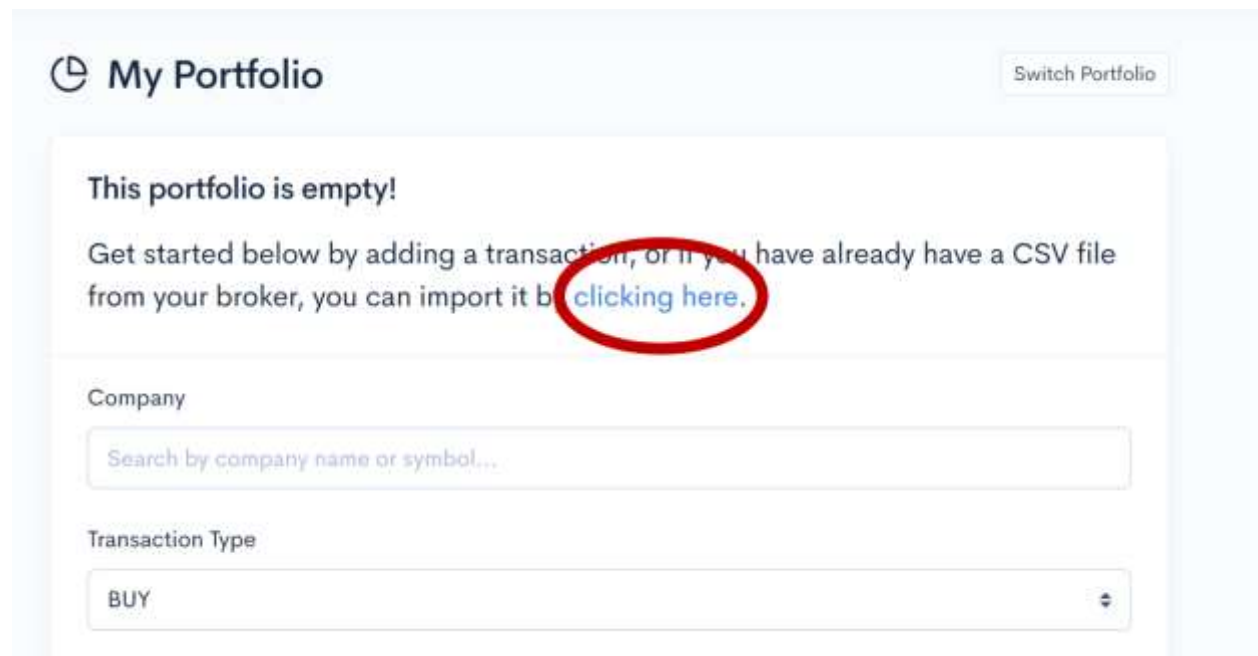


## Importing Data From Your Online Brokerage Account

The quickest way to get your complete portfolio performance history and income forecast is to IMPORT a CSV (comma separated values) file from your online brokerage account.

You will first need to download this file from your brokerage first and save it to your computer. Then import it into Divcaster. Here's how:

During your first login you will see the image below. To import a CSV file, you will want to click the text inside of the red circle.



My Portfolio Switch Portfolio

This portfolio is empty!

Get started below by adding a transaction, or if you have already have a CSV file from your broker, you can import it by [clicking here.](#)

Company

Search by company name or symbol...

Transaction Type

BUY

After clicking on the text, you will be prompted to upload a CSV file of your stock transactions.

**NOTE: This file comes from your own online brokerage account: Divcaster does not connect to your brokerage account. Almost every broker offers a method for exporting your transactions and portfolio. You should be able to find this when in your online brokerage account or you can contact them for help.**

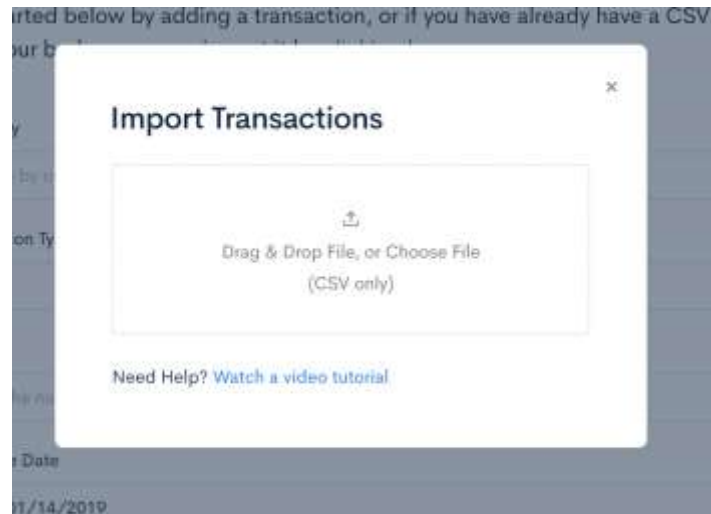
To properly upload your transactions, you will need at least these four data columns in your CSV file:

1. Stock Symbol
2. Date of Purchase
3. Purchase Quantity (how many shares did you buy)
4. Price paid per share

You'll have the option to import two more columns:

1. Transaction Type (buy or sell)
2. Transaction Cost

Now that you have your transaction CSV file, you can upload it to Divcaster! After clicking text in the red circle in the earlier image, you will be prompted with this screen:



Select your CSV file by either dragging and dropping the file icon into the box or click on the box and use your file selector.

Once you select your file, you will be taken to the following screen.

A screenshot of a web application showing a form titled "Import Transactions". The form has a header section with the title and a link "Need help? Watch the tutorial.". Below the header, there are four columns, each with a heading and a dropdown menu. The columns are: "Company Symbol", "Purchase Date", "Purchase Qty", and "Price". Each dropdown menu has the text "Select a column v". Below each dropdown menu, there is a large light blue box with the text "No column selected". At the bottom of the form, there are two buttons: "< 67 more transactions" and "Select date format v".

On this screen you will match the columns in your CSV file contain to those in Divcaster.

This is important because each online broker provides the data just a little differently and names the columns differently so you'll need to tell Divcaster which columns in your CSV file match up with columns the Divcaster needs.

To do this, you will use the dropdown item that says "Select a column".

Clicking on the dropdown will bring up a list of all of the columns from your CSV file.

**NOTE: Your brokerage might have exported some columns that are not needed by Divcaster, so in this step we will match the name of the column in the CSV to the data we desire to import.**

Go through this list and match the name of the column with Company Symbol, Purchase Date, Purchase Quantity, and Price where appropriate.

Here is what your transaction import will look like once you select these four columns. These stocks are example only, yours will vary.

**Import Transactions**

Select the data in your uploaded file that matches the heading for each of the columns below. Need help? [Watch the tutorial.](#)

Company Symbol	Purchase Date	Purchase Qty	Price
<input type="text" value="Security"/>	<input type="text" value="Open date"/>	<input type="text" value="Qty"/>	<input type="text" value="Adj. cost per share"/>
AAPL	7/2/2016	2	127.370000
AAPL	1/7/2016	2	104.000000
AAPL	2/11/2016	0.076	93.333300
AAPL	5/12/2016	0.066	91.130400
AAPL	8/11/2016	0.075	107.600000
<a href="#">+ 67 more transactions</a>			

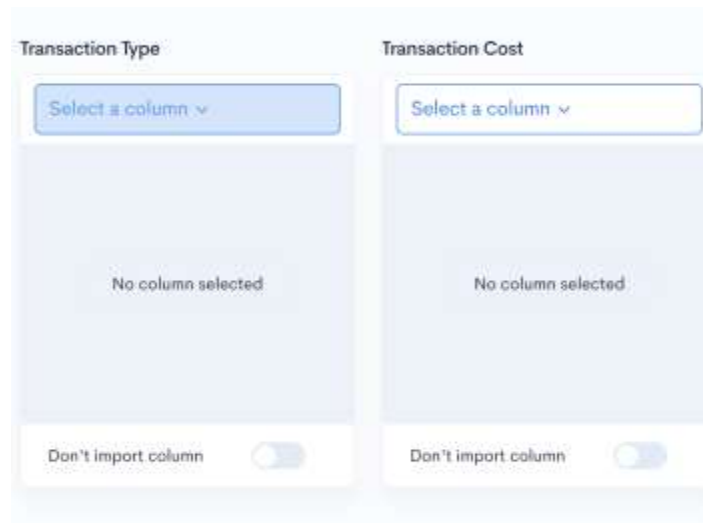
MM/DD/YYYY

Be sure to select a date format for the "Purchase Date" column! If the columns match and the data is correct, you will see the green check mark next to each column header.

You will not be asked to verify every transaction in your CSV file, only the first few lines to make sure there's a proper match between the columns in your CSV file and Divcaster.



There are also two optional columns that you can import: Transaction Type and Transaction Cost.



The image shows two side-by-side panels for importing data. The left panel is titled 'Transaction Type' and the right panel is titled 'Transaction Cost'. Each panel has a dropdown menu at the top with the text 'Select a column v'. Below the dropdown is a large light blue area with the text 'No column selected'. At the bottom of each panel is a toggle switch labeled 'Don't import column', which is currently turned off.

These columns are NOT REQUIRED. If you do not have these data columns or do not wish to import them, just select the “Don’t import column” option at the bottom.

Now that your columns have been matched and you have the green checkmark next to the column headers, go ahead and click the “Import Transactions” button at the bottom right-hand corner of the screen.

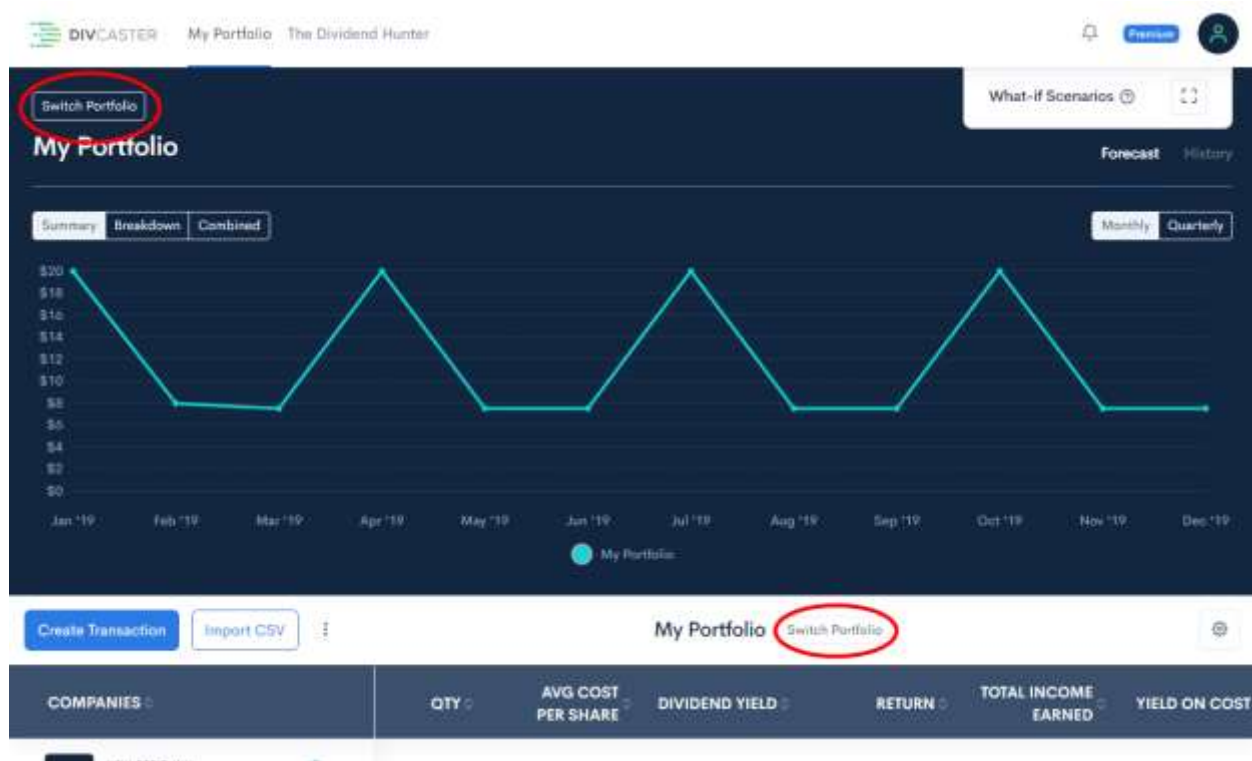
You’re all done! Once you click “Import Transaction” you will be taken your first portfolio screen. Here you will find your income forecasting chart, what-if scenarios, and your portfolio income history.

## Creating Additional Portfolios

There are two ways to create a new portfolio: use the switch portfolio function or duplicate a portfolio.

With a Divcaster Premium account you’re entitled to an unlimited number of portfolios. You can make as many portfolios as you want to suit your needs.

Locate either of the links for Switch Portfolio. See the image on the next page with the locations for Switch Portfolio circled in red.



When you click either link a new panel will appear on the left side with your primary portfolio indicated in dark blue.

At the bottom of that panel in light blue is a button to create a new portfolio. Press it. You will then be prompted to enter the name of the new portfolio you want to create.

Type in the name you wish to give your portfolio and click the check mark beside it.

When finished you can either close the panel using the X at the top or start adding stocks right away.

To start adding stocks just click on the name of the portfolio. You'll be taken to a screen similar to the one in the earlier section, "Setting Up Your First Portfolio". Here you can add transactions one at a time or use the CSV import tool just like when you created your first portfolio.

## Accessing Other Tools

Besides the Divcaster service your subscription gives you access the user manual, this quickstart guide, a tutorial video, and periodic special reports. To access all of these just log in at <https://www.InvestorsAlley.com> and look under the Divcaster listing.

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