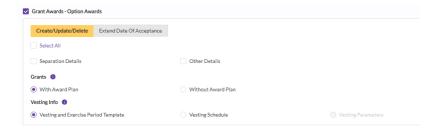
Grant Awards - Option Awards Bulk Upload

Modified on: Fri, 24 Feb, 2023 at 10:26 AM

You can import the data for your employees' equity allocations in bulk using our Bulk Upload Functionality.

- 1. Sign in to your Qapita Account
- 2. Click Settings on the left menu and select Bulk Upload
- 3. Select Grant Award Option Awards
- **4. Awardee Details and Award Details are mandatory columns**. You may wish to add Separation Details and other details.



- 5. Scroll down and Select Download Template or Download Template with Data
 - i. **Download Template**: to download the template with no data. This is preferable if you are uploading the data for the first time.
 - ii. **Download Template with Data**: to download the template with existing data. If you choose to add to new employee option awards to the already existing grants or modify the existing awards.



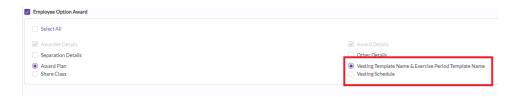
- A. Click on Action dropdown and select "Unchanged/Add/update/Delete"
- B. Do not input any data in **Option Award ID** column, it is auto generated.
- C. Awardee Details:
 - i. Stakeholder: Choose the stakeholder from the dropdown. If there are multiple stakeholders with the same legal name, application expects stakeholder ID idagainst the transaction.
 - ii. Stakeholder ID: refer to the stakeholder reference sheet to get the stakeholder ID
 - iii. Employee ID
 - iv. Stakeholder email ID

D. Award Details:

i. Award Plan: Select the award plan from the dropdown

- ii. Grant Certificate ID
- iii. Grant Date
- iv. Exercise Price: Currency and Amount
- v. Granted: number of instruments granted.

Additional columns in the excel based on the Radio Option Chosen.



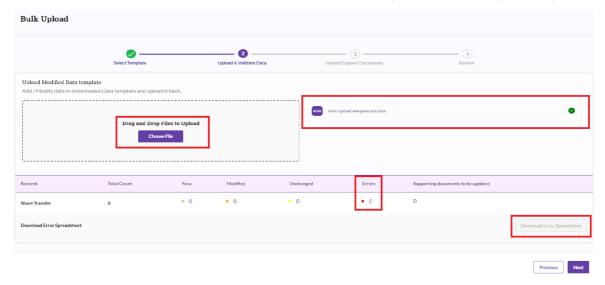
E. Vesting Template Name & Exercise Period Template Name

Vesting Start Date* (yyyy-mm- dd)	Vesting Template Name*	Exercise Period Template Name*	Inherit Separation Rules associated to the Plan*	Type Of Grant*	Acceptance Flow	Grant Letter Template	Approvers	Last Date of Acceptance (yyyy- mm-dd)	Supporting Documents

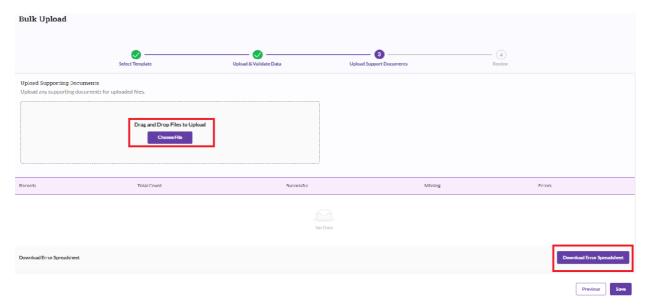
- i. Vesting Start Date: in the format (yyyy-mm-dd)
- ii. Inherit Separation Rules associated to the Plan: Yes/No
- iii. Grant Status: Accepted/Rejected/Draft
- iv. Vesting Schedule Tranche 1
 - Vesting Date
 - Units
 - Start Date of Exercise
 - Last Date of Exercise
- v. Type of Grant: Record Grant/Enable Acceptance Flow
- vi. Acceptance Flow: Acceptance/ ESign
- vii. Grant Letter Template: Choose from the dropdown
- viii. Approvers: Specify comma separated email addresses for 'Approvers'.
- ix. Last date of Acceptance

#Note: Tranche 2, Tranche 3 columns will populate only if any one of the given Stakeholders in the application has had more than 1 tranche.

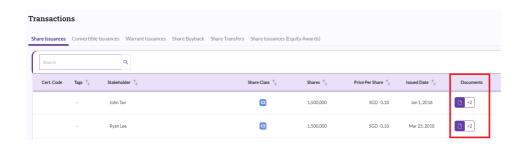
- 6. Save the File
- 7. On the Bulk Upload page of your Qapita Account, please click on **Upload File** at the right bottom of the page. Click on **Choose File** and upload the saved file for **Grant Award Option Awards**.



8. Upload **Support Documents** if any. You can view these documents uploaded in the Transactions Page on the application against the respective stakeholder.



To view these documents uploaded on the application, click **Ownership** on the left menu and select **Transactions**.



- 9. Click on Save
- 10. Review all the details and Close