

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

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.

- 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

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.

☒ Employee Option Award

☐ Select All

☒ Awardee Details

☐ Separation Details

☒ Award Plan

☐ Share Class

☒ Award Details

Other Details

☒ Vesting Template Name & Exercise Period Template Name

☐ Vesting Schedule

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*	Grant Status*	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**.

Bulk Upload

1

Select Template

2

Upload & Validate Data

3

Upload Support Documents

4

Review

Upload Modified Data template

Add / Modify data in downloaded Data template and upload it back.

Drag and Drop Files to Upload

Choose File

100%

Ref's upload template (0/1) xlsx

Records	Total Count	New	Modified	Unchanged	Errors	Supporting documents to be updated
Share Transfer	0	0	0	0	0	0

Download Error Spreadsheet

Download Error Spreadsheet

Previous

Next

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

Bulk Upload

1

Select Template

2

Upload & Validate Data

3

Upload Support Documents

4

Review

Upload Supporting Documents

Upload any supporting documents for uploaded files.

Drag and Drop Files to Upload

Choose File

Records	Total Count	Successful	Missing	Errors
No Data				

Download Error Spreadsheet

Download Error Spreadsheet

Previous

Save

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

Transactions

Share Issuances

Convertible Issuances

Warrant Issuances

Share Buyback

Share Transfers

Share Issuances (Equity Awards)

Search

Cert. Code	Tags	Stakeholder	Share Class	Shares	Price Per Share	Issued Date	Documents
-		John Tan	CS	1,500,000	SGD 0.10	Jan 1, 2018	<div><div>1</div>+2</div>
-		Ryan Lee	CS	1,500,000	SGD 0.10	Mar 25, 2018	<div><div>1</div>+2</div>

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