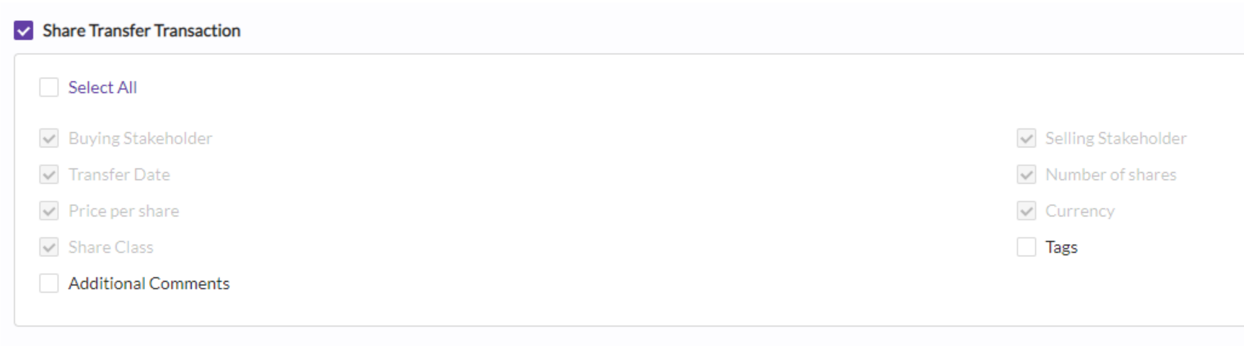
Share Transfer Transaction

Modified on: Thu, 23 Jun, 2022 at 7:10 PM

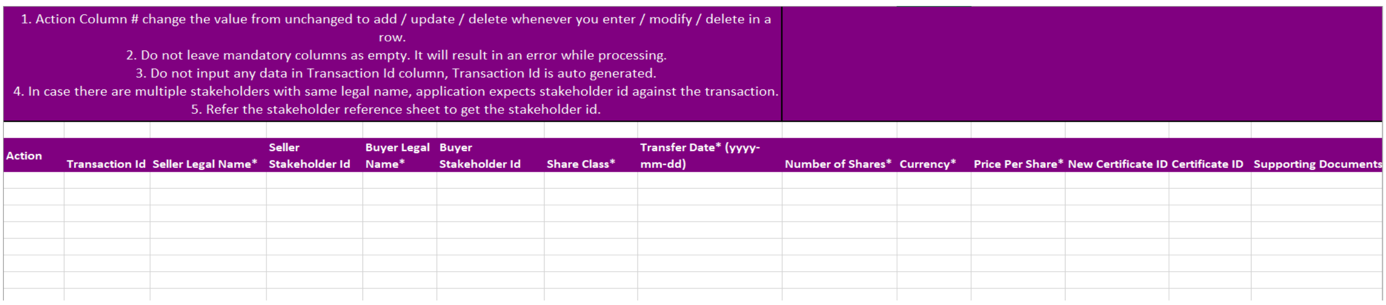
You can record multiple historical share transfers via Bulk Upload functionality.

1. Sign in to your Qapita Account
2. Click **Settings** on the left menu and select **Bulk Upload**
3. Select **Share Transfer Transaction**
4. **Buying Stakeholder, Selling Stakeholder, Transfer Date, Number of Shares, Price Per Share, Currency, Share Class are mandatory columns**. You may choose to add columns such as Additional Comments & Tags.

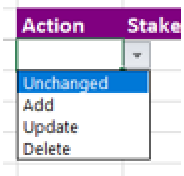


5. Scroll down and Select **Download Template** or **Download Template with Data**

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 new transfer records to the already existing data or modify the existing transfer transactions.

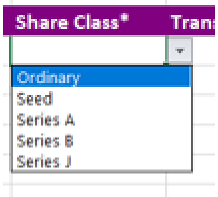


A. Click on **Action** dropdown and select “Unchanged/Add/Update/Revert”



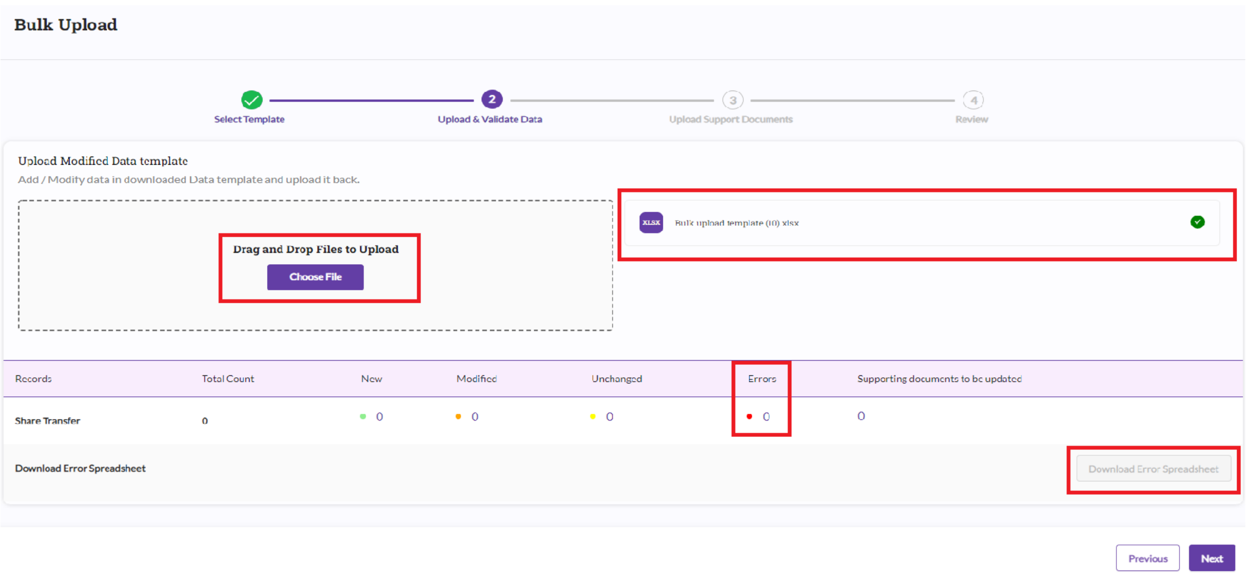
i. **Unchanged** : When no changes are required for an existing transfer
ii. **Add** : When you must add a new transaction
iii. **Update**: When you must update the details for an existing share transfer
iv. **Delete :** When you have to delete the Stakeholder Information

B. **Transaction ID:** Do not input data in Transaction ID column as this is Autogenerated.
C. **Seller Legal Name**
D. **Seller Stakeholder ID:** Refer the stakeholder reference sheet to get the stakeholder id
E. **Buyer Legal Name**
F. **Buyer Stakeholder ID:** Refer the stakeholder reference sheet to get the stakeholder id
G. **Share Class:** Choose from the drop down.

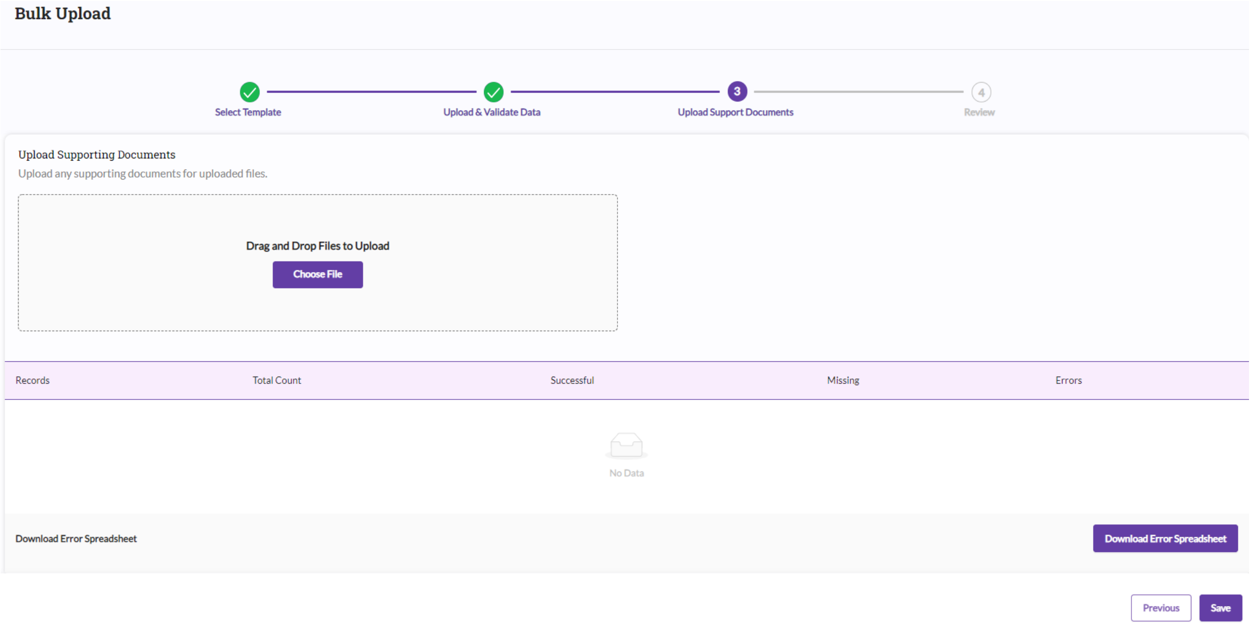


H. **Transfer Date**
I. **Number of Shares**
J. **Currency**
K. **Price per share**
L. **New Certificate ID**
M. **Certificate ID**
N. **Supporting Documents:** If any, please mention the name of the supporting documents.

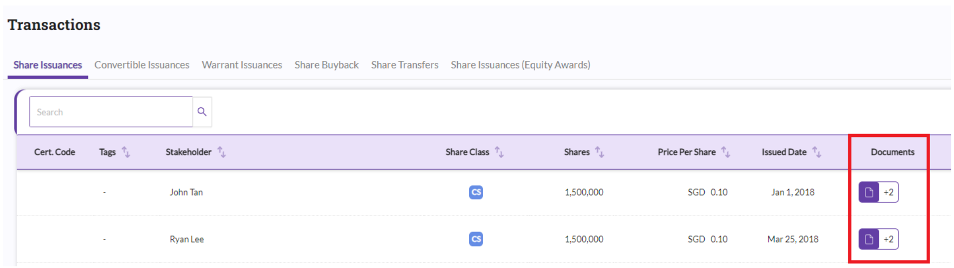
6. Save File
7. On the Bulk Upload page of your Qapita Account, please click on **Upload File** at the right bottom of the page. Click on **Choose File** and upload the saved file for **Share Transfer Transaction**



8. Click on **Next**
9. Upload **Support Documents** if any. You can view these documents uploaded in the transactions against the respective stakeholder.



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



10. Click on Save

11**. Review** all the details and click on **Close.**