

Captable - By Transaction Tags and Stakeholder Category

Modified on: Fri, 20 Jan, 2023 at 5:10 PM

Admins can now see the Captable grouped by the transaction tags and Stakeholder Category.

Transaction Tags:

In order to view your Captable by the tags, the prerequisite is to have tags associated with each of the transactions. In order to do this, navigate to the transaction screen and edit a transaction. You will then have to associate tag(s) with this transaction and click on the save button.

The screenshot shows the 'Edit Share Issuance' modal form. The 'Tags' section is highlighted with a red box, showing a tag 'Seed Investor' with a close icon. The form also includes fields for Certificate Code, Date of Issuance, Number of Shares, Price Per Share, Exchange Rate, Total Amount Invested (Computed), Additional Comments, and Supporting Documents. The background shows the 'Transactions' table with columns for Cert. Code, Tag, and Status.

Once you are done associating tag(s) with each of the transactions, navigate back to Captable. Go to column Configurations and select transaction tag from Group By's and Column Settings. Done!

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View by: Transaction ...

Save View

Transaction Tags	5 Stakeholder(s)		22,500 Fully Diluted Shares	INR 90,000,000 Primary Amount Invested
Shareholdings				
> Series A Investor	2 Stakeholders		10,000	INR 50,000,000
> Seed Investor	2 Stakeholders		7,500	INR 15,000,000
> Seed Transfer	2 Stakeholders		-	INR 0
> Convertible	1 Stakeholder		-	INR 25,000,000
Subtotal	5 Stakeholders		17,500	INR 90,000,000
Employee Equity Awards Pool				
Equity Awards Allocated			2,500	

Column Settings (7 Selected)

Select All

Stakeholder(s)

Security Class Name(s)

Transaction Tags

Stakeholder Category

Transaction Date

Transaction Tags

Group by

Reset default

You are now viewing your Captable by the tags that were associated with your transactions.

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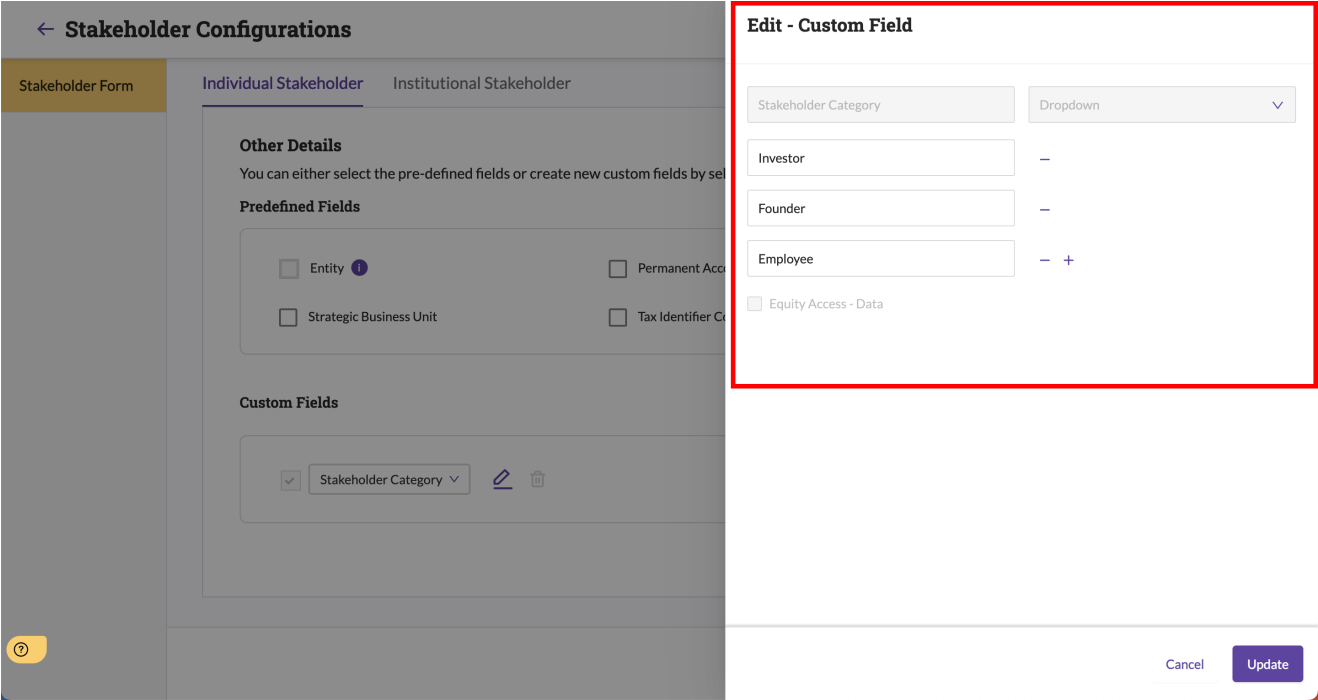
Save View

Transaction Tags	5 Stakeholder(s)	Transaction Date	S SA CA Security Class(es)	22,500 Fully Diluted Shares	INR 90,000,000 Primary Amount Invested
Shareholdings					
> Series A Investor	2 Stakeholders	2 transactions	SA	10,000	INR 50,000,000
> Seed Investor	2 Stakeholders	2 transactions	S	7,500	INR 15,000,000
> Seed Transfer	2 Stakeholders	2 transactions	S	-	INR 0
> Convertible	1 Stakeholder	1 transaction	CA	-	INR 25,000,000
Subtotal	5 Stakeholders	7 transactions		17,500	INR 90,000,000
Employee Equity Awards Pool					
Equity Awards Allocated				2,500	

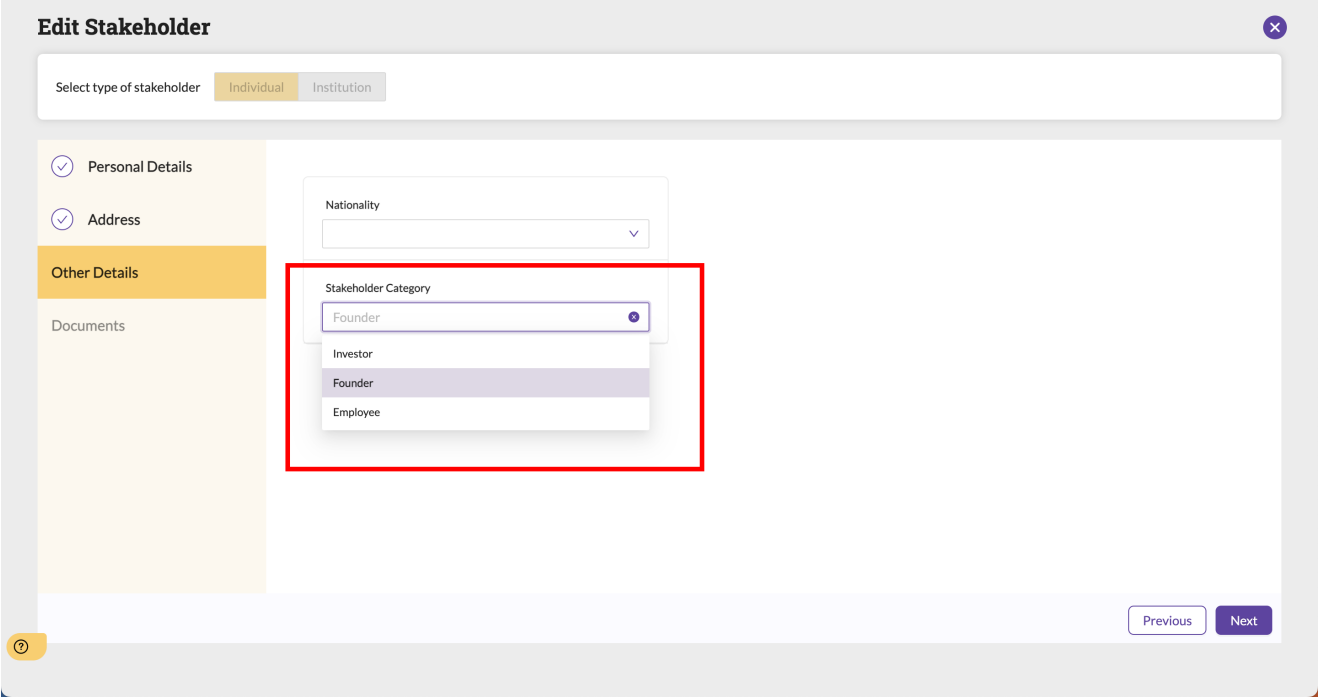
See this in action with the [feature video here.](https://www.awesomescreenshot.com/video/14141950?key=54e98f50e8d0b41c15eb35ee33e6bb45)

Stakeholder Category:

In order to view your Captable by Stakeholder Category, the prerequisite is to have a category associated with every stakeholder. In order to do this navigate to Settings > Configurations> Stakeholder Configuration. You will see a custom field called: **"Stakeholder Category"**. By default, there will be two-three dropdown values i.e Founder, Investor, and Employee. As an admin, you can add more values to this category. Make sure to add these values separately for Institutional stakeholders also.



Once done, navigate to Stakeholders from the left panel, and start associating categories for each of the stakeholders(You can also perform this action in bulk from the Bulk upload menu).



Once you complete associating the category with all the stakeholders just navigate to your Captable. Go to column configurations, and select the stakeholder category from the group by and from column settings. Done! You are viewing your Captable by the category with which the stakeholders are associated.

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View by: Stakeholder ...

Save View

Stakeholder Category	5 Stakeholder(s)		22,500 Fully Diluted Shares	INR 90,000,000 Primary Amount Invested
Shareholdings				
> Investor	3 Stakeholders		11,000	INR 77,000,000
> Founder	2 Stakeholders		6,500	INR 13,000,000
Subtotal	5 Stakeholders		17,500	INR 90,000,000
Employee Equity Awards Pool				
Equity Awards Allocated			2,500	
Equity Awards Unallocated or Reserved			2,500	
Subtotal			5,000	

Group by (1 Selected)

Select All

Stakeholder(s)

Security Class Name(s)

Transaction Tags

Stakeholder Category

Column Settings (7 Selected)

Select All

Stakeholder(s)

Stakeholder Category

Country

Reset default

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View by: Stakeholder ...

Save View

Stakeholder Category	5 Stakeholder(s)	Transaction Date	S SA CA Security Class(es)	22,500 Fully Diluted Shares	INR 90,000,000 Primary Amount Invested
Shareholdings					
> Investor	3 Stakeholders	4 transactions	SA S CA	11,000	INR 77,000,000
	Youth Ventures	Jan 1, 2020	SA	6,000	INR 30,000,000
	Kshitij Bajwa	Jan 1, 2020	SA	4,000	INR 20,000,000
	Youth Ventures	Jan 8, 2020	S	1,000	INR 2,000,000
	Surjeet Singh	Jan 1, 2018	CA	-	INR 25,000,000
> Founder	2 Stakeholders	3 transactions	S	6,500	INR 13,000,000
Subtotal	5 Stakeholders	7 transactions		17,500	INR 90,000,000
Employee Equity Awards Pool					

See this in action with the [feature video here](https://www.awesomescreenshot.com/video/14142228?key=613391d47a5e9c159292636d2d8761d3).(https://www.awesomescreenshot.com/video/14142228?key=613391d47a5e9c159292636d2d8761d3)