User Invitations

Modified on: Thu, 23 Jun, 2022 at 7:12 PM

Qapita allows you to invite various stakeholders to access, view and administrate your company's equity. You can import the list of stakeholders you wish to invite via the Bulk Upload functionality.

1. Sign in to your Qapita Account
2. Click **Settings** on the left menu and select **Bulk Upload**
3. Select **User Invitation**
4. **First Name, Last Name, Legal Name, Email ID, Role, Captable Access are all mandatory columns**. Do not leave any columns empty as it will result in an error while processing.

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 invite new stakeholders on top of the existing population or modify access for existing stakeholders.
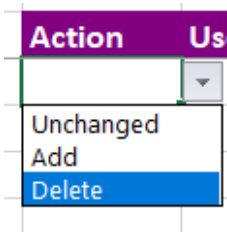

A. Click on **Action** dropdown and select "Unchanged/Add/Delete"

B. **User Task ID**: do not input any data as it is auto generated.
C. **First Name**
D. **Last Name**
E. **Legal Name**
F. **Roles**: select the roles from the dropdown

G. Captable Access: select the access level from the dropdown

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 **User Invitation**.

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 click on **Close.**