

User Invitations

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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.

☒ User Invitations

☐ Select All

☒ First Name

☒ Legal Name

☒ Role

☒ Last Name

☒ Email ID

☒ CapTable Access

- 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.

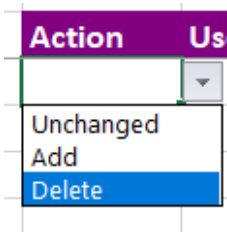
1. Action Column # change the value from unchanged to add / update / delete whenever you enter / modify / delete in a row.

2. Do not leave mandatory columns as empty. It will result in an error while processing.

3. Do not input any data in User Task Id column, User Task Id is auto generated.

Action	User Task Id	First Name*	Last Name*	Legal Name*	Email* (example@mail.com)	Stakeholder Id	Stakeholder	Roles*	Captable Access*

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

Roles* Ca

Administrator

Investor

Employee

Advisor

potential investo

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

Captable Access*

Individual View

Summary CapTable View

Detailed CapTable View

No Access

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**.

Bulk Upload

1 Select Template

2 Upload & Validate Data

3 Upload Support Documents

4 Review

Upload Modified Data template

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

Drag and Drop Files to Upload

Choose File

data

data's upload template (it) 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	+2
-		Ryan Lee	CS	1,500,000	SGD 0.10	Mar 25, 2018	+2

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