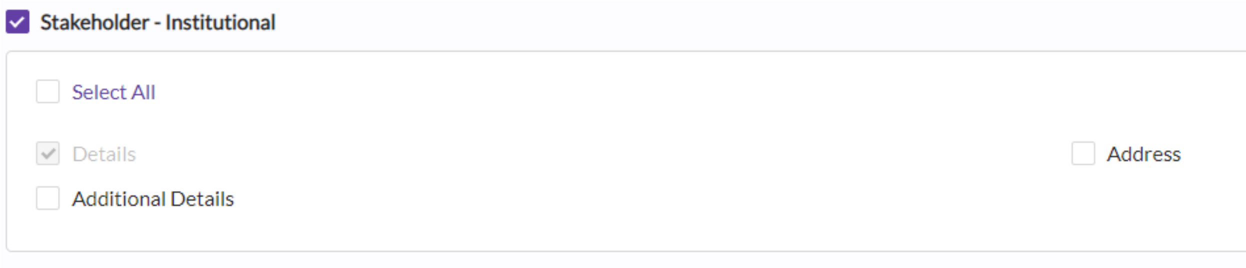
Stakeholder Institutional

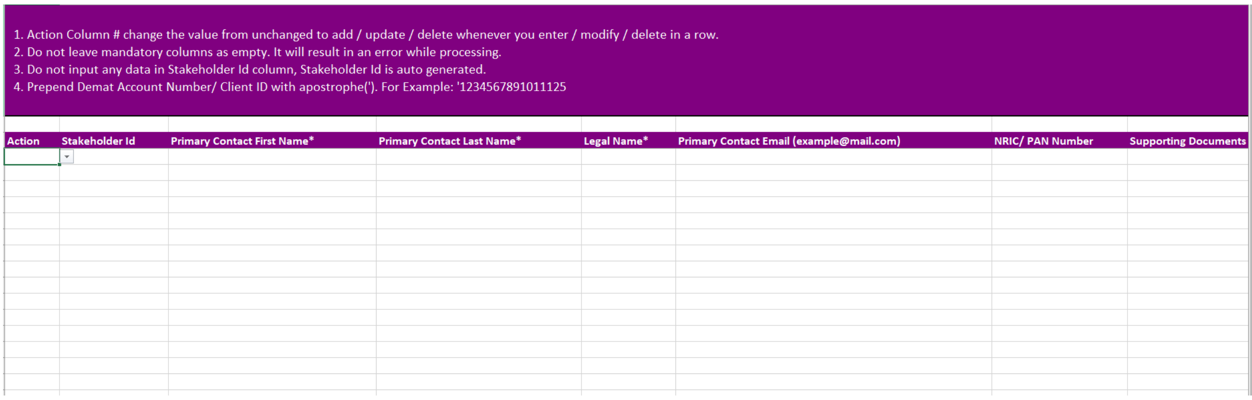
Modified on: Thu, 23 Jun, 2022 at 7:08 PM

1. Sign in to your Qapita Account
2. Click **Settings** on the left menu and select **Bulk Upload**
3. Select **Stakeholder-Institutional**
4. **Details** is mandatory. You may choose to select Address & Additional Details.

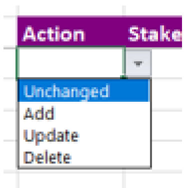


5. Scroll down and Select **Download Template** or **Download Template with Data**

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 stakeholders to the already existing data or modify the existing institutional stakeholder's data.



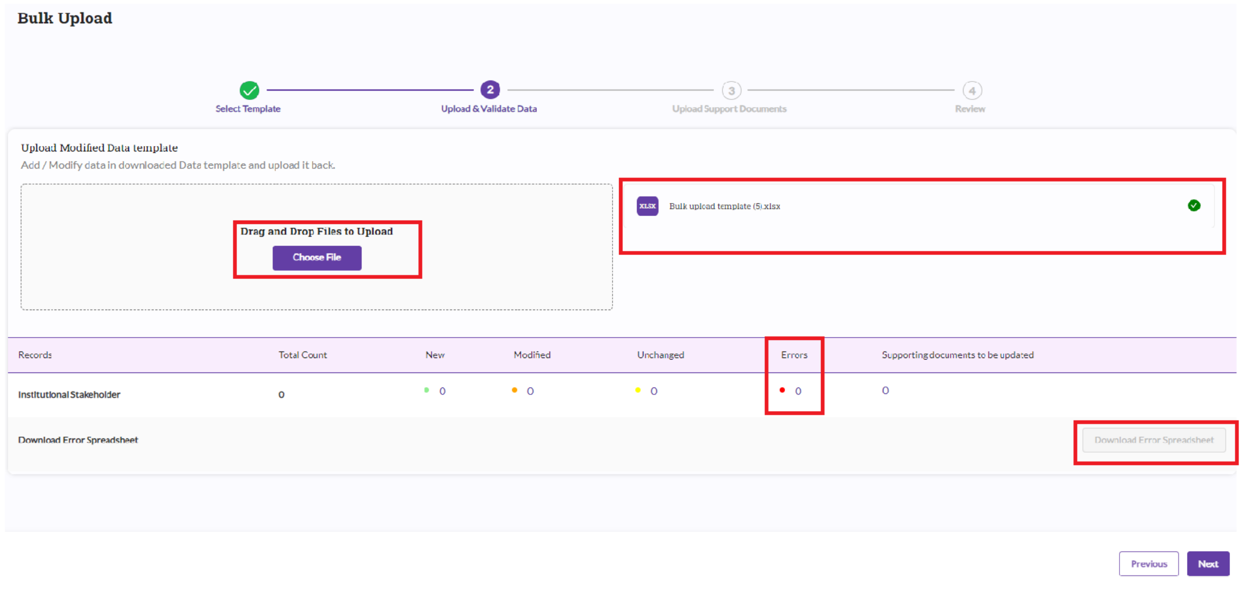
A. Click on **Action** dropdown and select “Unchanged/Add/Update/Delete”



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

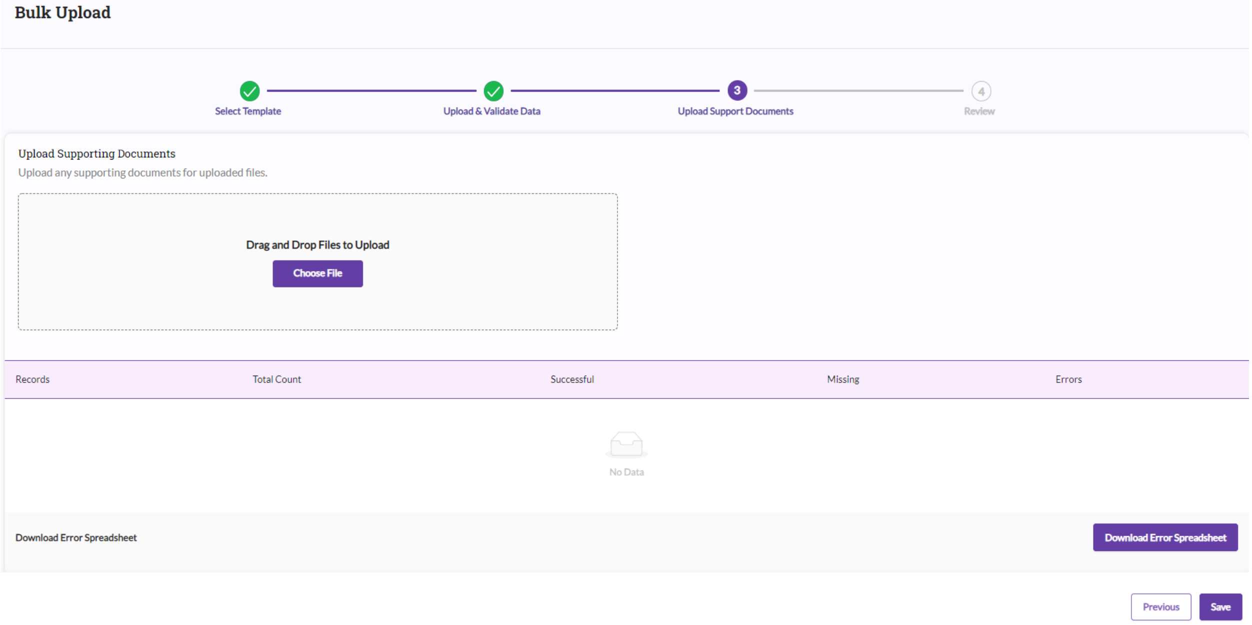
B. **Stakeholder ID:** Do not input any data under Stakeholder ID as it is autogenerated.
C. **Primary Contact First Name: Mandatory Field**
D. **Primary Contact Last Name: Mandatory Field**
E. **Legal Name: Mandatory Field**
F. **Primary Contact Email (example@mail.com):** This field is not mandatory, but we encourage you to provide this information to assist with future communications.
G. **NRIC/ PAN Number:** NRIC is the identity document used in Singapore and PAN is for India. As of now, we have this column as default in the template only for Singapore and India. For other countries, you must add an additional column as Custom Field and input the data. For instance: US – SSN No.
H. **Supporting Documents:** If any, please mention the file name of the supporting document(s).

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
8. Click on **Choose File** and upload the saved file for **Stakeholder Institutional**

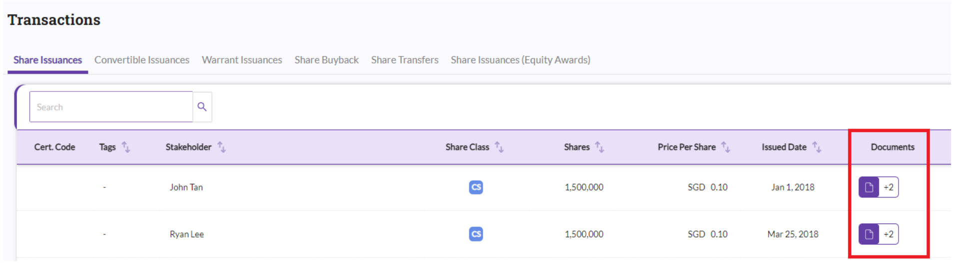


i. When the file is uploaded you can see the green dot against the file.
ii. If there are any errors on the Spreadsheet, you can see the number of errors on the sheet under **Errors** and click on **Download Error Spreadsheet** to make the changes and upload it back.

9. Click on **Next**
10. 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.



11. Click on **Save**
12. **Review** all the details and click on **Close.**