

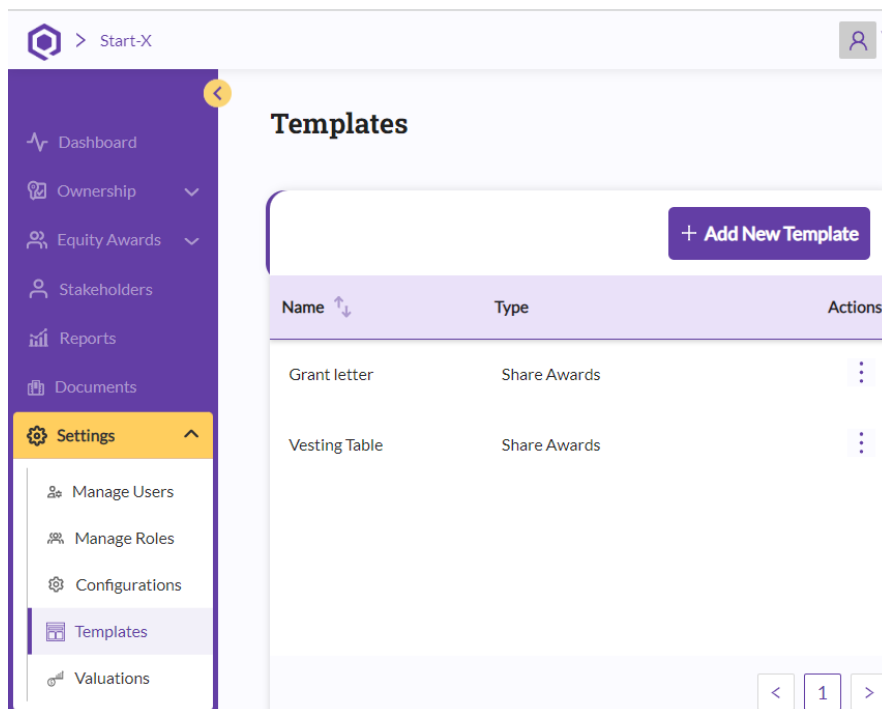
Create a Template in QapMap

Modified on: Thu, 26 May, 2022 at 3:19 PM

The QapMap workflow simplifies adding fields to grant letters for equity awards and share certificates templates. All you need to do is create the draft document in MS Word and upload it to QapMap, and add the required fields in the Document Editor.

To add fields to a template:

1. Click Settings in the left menu and select Templates.
2. In the displayed Templates page, click **Add New Template**.



3. Type the **Template name**.

Create Template

Template Info

* Template Name
April 2022 Share Award

* Template Type
Share Awards

Select a Template

Continue with sample template | Upload a new document (.docx)

Share Award.docx

Cancel | Next

4. Select the **Template Type**.

5. Under **Select a Template**, you can choose to do one of the following:

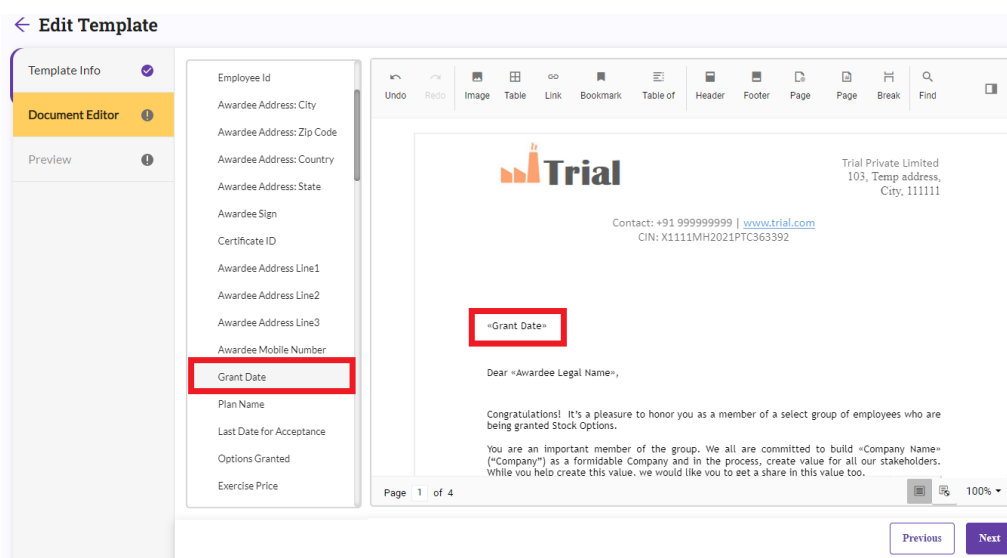
- **Continue with sample template**, using a sample QapMap provides. Click the Download button to save the document.
- Upload a new document to select the Word document. You can also drag and drop the document.

6. Click **Next**.

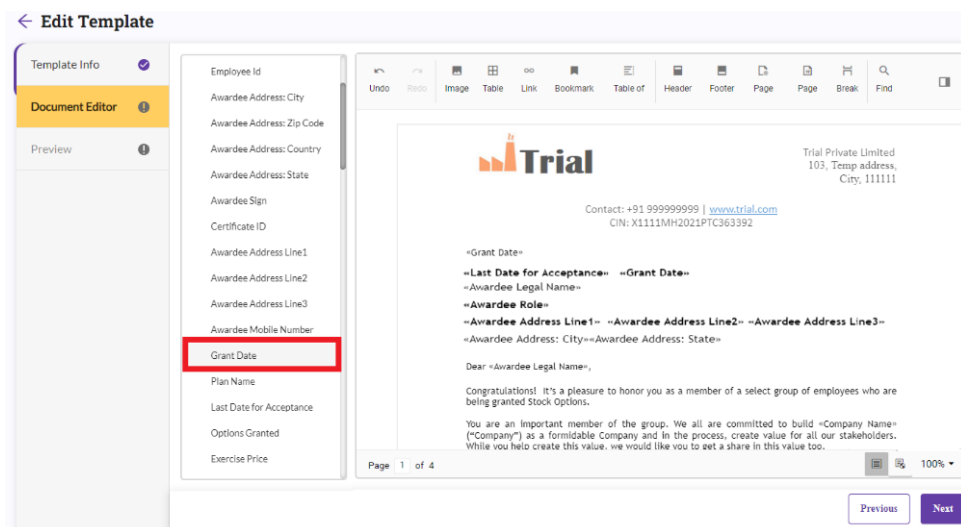
Using the Document Editor

1. The document is opened in the Document Editor. You can now build the template using variables.
2. Place the cursor where you want to insert a variable. Locate the variable in the left panel and click it to add it to the document.

For example, to add the Date in the first line of the document, position the cursor in the document, locate the field, and click it.

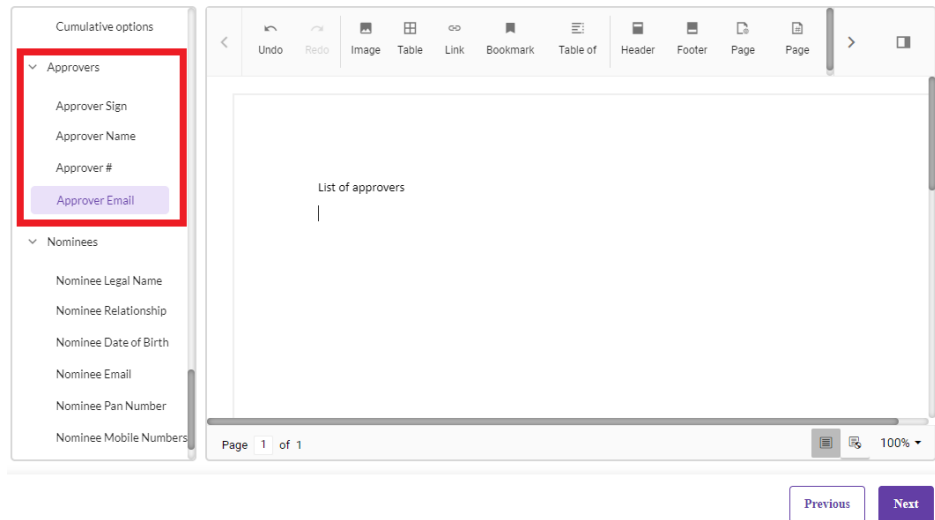


3. Similarly, you can add all other fields.

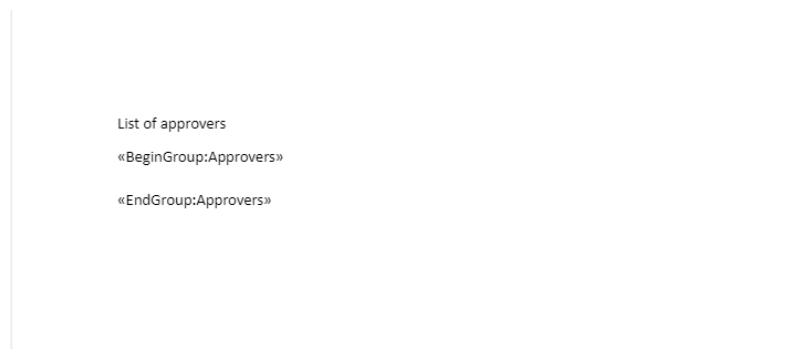


Add Approver List

1. To include Approver list, place the cursor where you want to insert the list of approvers. In the Select Field to Insert, navigate to the **Approvers** options.

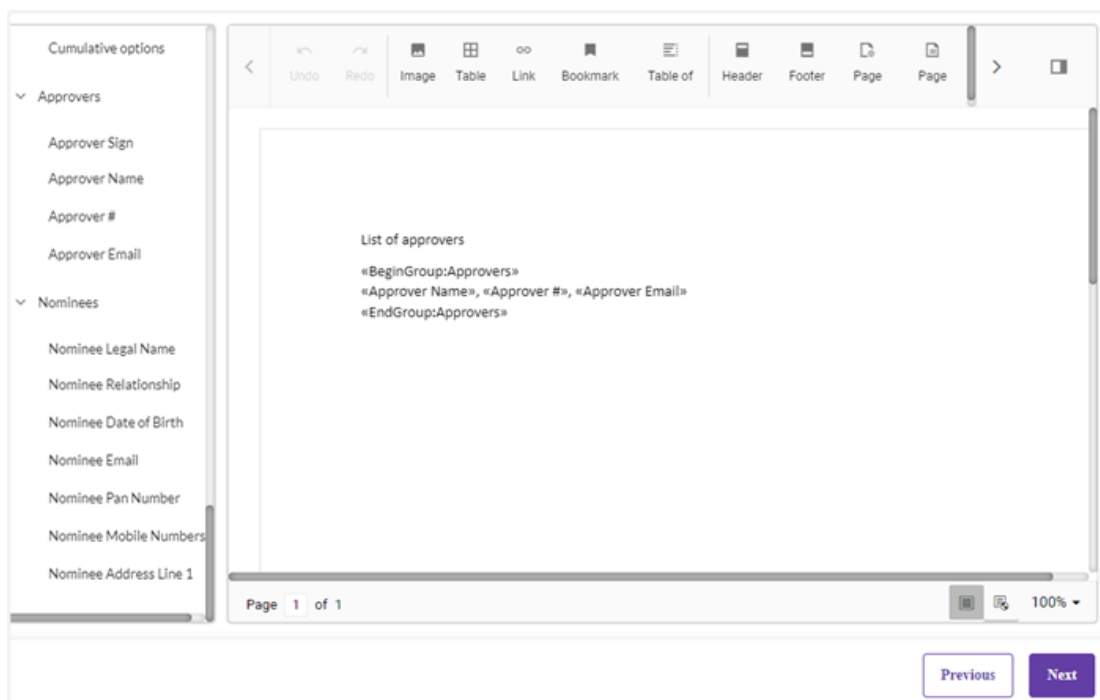


2. Click **Approvers**. The placeholders for approvers are generated.



3. Now, position the cursor between the begin and end approver group and select other approver details you want to include.

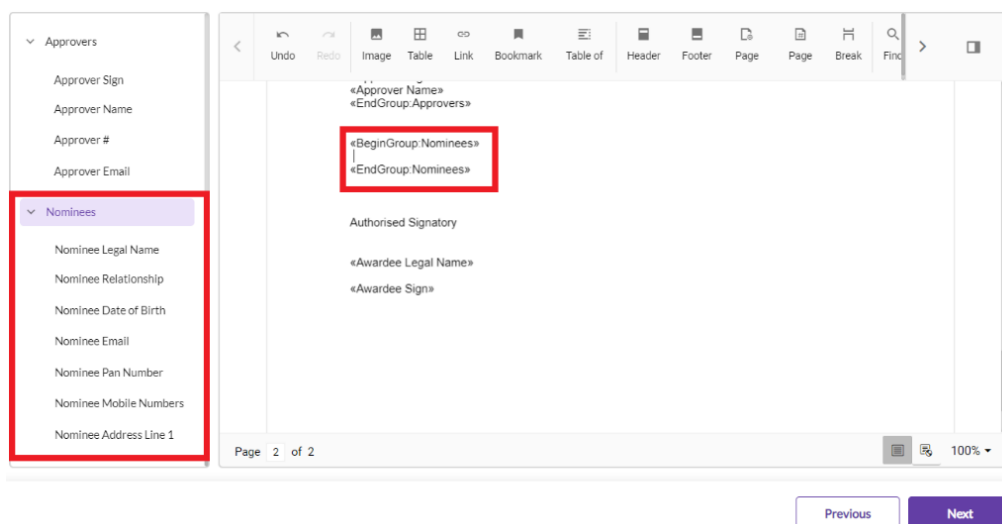
Important: Only details included between the begin and end approver will be displayed. If there are more than 1 approver, these will be displayed one on each row.



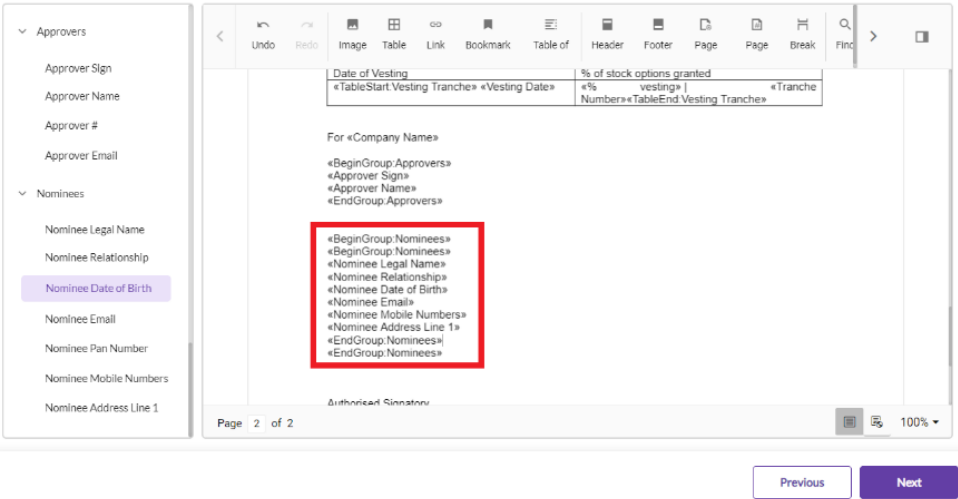
Add Nominee List

To include Nominee list:

1. Place the cursor where you want to insert the list of nominees.
2. In the Select Field to Insert, navigate to the Nominees options and click **Nominees**. The placeholders for nominees are generated.



3. Now, position the cursor between the begin and group nominees group and select other approver details you want to include.



Important: Only details included between the begin and end nominees will be displayed. If there are more than 1 approver, these will be displayed one on each row.

Add a Vesting Schedule Table

QapMap allows you create the Vesting Schedule as a template.

Let's look at how to create a vesting table as shown below. Please follow these steps carefully to create a table.

Vesting Schedule and Vesting Conditions

| Dates of Vesting | Options to vest | Vesting Conditions |
|------------------|-----------------|---|
| | | 1. 25% of the Options are eligible for Vesting at the end of 12 (twelve) months from the Grant Date; 2. Thereafter, 6% of the Options will be Vesting every quarter for the next 9 quarters; and |
| 25-Mar-2023 | 25.00 | |
| 25-Apr-2023 | 12.60 | |
| 25-May-2023 | 12.40 | |
| 25-Jun-2023 | 12.60 | |
| 25-Jul-2023 | 12.40 | |
| 25-Aug-2023 | 12.60 | |
| 25-Sep-2023 | 12.40 | |

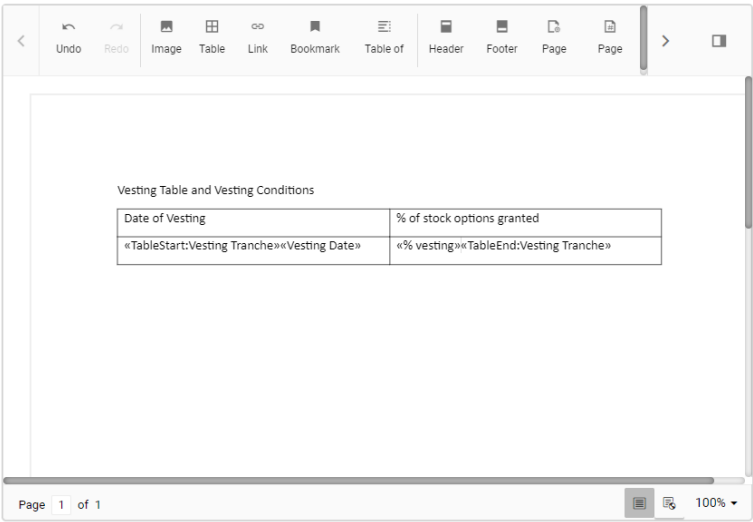
To create a vesting table in a template:

1. Click **Templates** in the left menu.
2. In the displayed Templates page, click **Add New Template**.
3. Select the Word document which has the contract document. You can also drag and drop the document. Click **Next**.

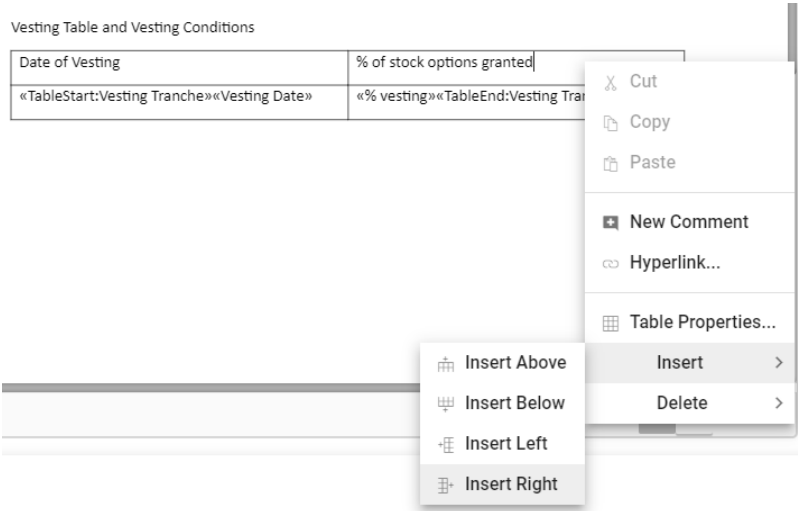
1. The document is opened in the Document Editor.
2. Place the cursor where you want to insert a table. In the Select Field to Insert, navigate to the Vesting Tranche options.

3. Click **Vesting Tranche**. The Vesting table is automatically populated.

4. To insert the Vesting Date, position the cursor **after** «TableStart:Vesting Tranche» and click **Vesting Date**.
5. To insert the % of stock options granted, position the cursor **before** «TableEnd:Vesting Tranche» and click **% vesting**.



6. To insert the column to include Vesting Conditions, right-click the table, under table properties, click Insert, and select **Insert Right**.



7. In the new column, type the header and detail.

| Vesting Table and Vesting Conditions | | |
|--|---------------------------------------|---|
| Date of Vesting | % of stock options granted | Vesting Conditions |
| «TableStart:Vesting Tranche»«Vesting Date» | «% vesting»«TableEnd:Vesting Tranche» | 1. 25% of the Options are eligible for Vesting at the end of 12 (twelve) months from the Grant Date 2. Thereafter, 6% of the Options will be Vesting every quarter for the next 9 quarters |

8. Click **Next** to preview the table.

| Vesting Table and Vesting Conditions | | |
|--------------------------------------|----------------------------|---|
| Date of Vesting | % of stock options granted | Vesting Conditions |
| | | 1. 25% of the Options are eligible for Vesting at the end of 12 (twelve) months from the Grant Date 2. Thereafter, 6% of the Options will be Vesting every quarter for the next 9 quarters |
| 25-Mar-2023 | 25.00 | |
| 25-Apr-2023 | 12.60 | |
| 25-May-2023 | 12.40 | |
| 25-Jun-2023 | 12.60 | |
| 25-Jul-2023 | 12.40 | |
| 25-Aug-2023 | 12.60 | |
| 25-Sep-2023 | 12.40 | |

9.Click **Submit** to create the template.

Document Preview

To view the template as a document for a specific grant:

1. Type the name of employee in **Preview with** field.

Preview with:

GT-OA-045 - Aida Balaji - 3/30/2022 - (100 units)

GT-OA-030 - Aida Balaji - 3/29/2022 - (10 units)

GT-OA-023 - Aida Balaji - 3/29/2022 - (20 units)

GT-OA-022 - Aida Balaji - 3/29/2022 - (25 units)

GT-OA-020 - Aida Balaji - 3/29/2022 - (20 units)

GT-OA-019 - Aida Balaji - 3/29/2022 - (10 units)

GT-OA-018 - Aida Balaji - 3/29/2022 - (10 units)

Aida Balaji - 2/9/2022 - (123 units)

3. Click **Previous** to go back to the Document editor and make any changes needed.
4. Click **Submit** once the document is final. The template is added to the list of templates.