
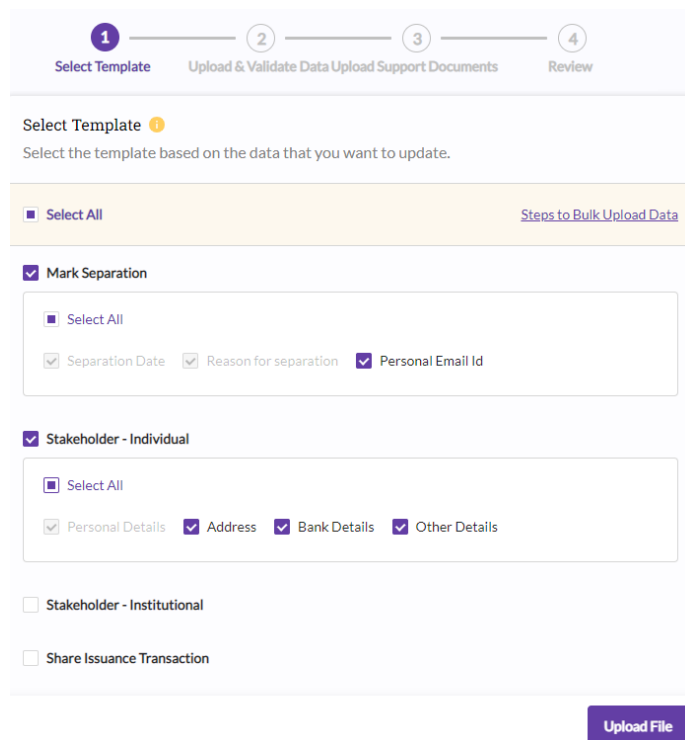


Bulk Upload Multiple Transactions

Modified on: Thu, 26 May, 2022 at 3:23 PM

To bulk upload transaction data:

1. Click **Ownership > Transactions** in the left menu.
2. Click . The Bulk Upload screen is displayed.
3. Select the details you want to include by clicking the field, and enabling the relevant fields.



1 Select Template 2 Upload & Validate Data 3 Upload Support Documents 4 Review

Select Template ⓘ
Select the template based on the data that you want to update.

☐ Select All [Steps to Bulk Upload Data](#)

☒ Mark Separation

☐ Select All

☒ Separation Date ☒ Reason for separation ☒ Personal Email Id

☒ Stakeholder - Individual

☐ Select All

☒ Personal Details ☒ Address ☒ Bank Details ☒ Other Details

☐ Stakeholder - Institutional

☐ Share Issuance Transaction

1. Click **Download Template** (at the bottom of the screen) to make a copy of it. You can click Download Template with Data to save a copy of the template with sample data.
2. Add data/ make changes to the data to the template and save it.
3. Click **Upload File**.
4. If there are any errors in the upload, click Download Error Spreadsheet and make changes to the spreadsheet.

✓

Select Template

2

Upload & Validate Data

3

Upload Support Documents

4

Review

Upload Modified Data template

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

Drag and Drop Files to Upload

Choose File

xlsx

Bulk upload template (1).xlsx

✓

Records	Total Count	New	Modified	Unchanged	Errors	Supporting documents to be updated
Share Transfer	11	<div>0</div>	<div>0</div>	<div>11</div>	<div>0</div>	0

Download Error Spreadsheet

Download Error Spreadsheet

Previous

Next

- 1. Click **Next**.
- 2. Click **Choose File** to upload Supporting Documents. Navigate to the file location, select the file, and click **Open**.
- 3. Click **Save** to complete the bulk upload process.