

Bulk Upload

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Self-Serve Onboarding.

Here're the steps to bulk upload the data to your Qapita Account.

1. Sign in to your Qapita Account
2. Click **Settings** on the left menu and select **Bulk Upload**
3. Select the **Template** you want to update (Template explanations are stated below).

1. **Mark Separation via Bulk Upload** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560818-mark-separation-in-bulk-upload>).
2. **Stakeholder – Individual** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559888-stakeholder-individual-for-employees-and-investors->).
3. **Stakeholder – Institutional** (<https://qapita-fintech.freshdesk.com/en/support/solutions/articles/72000559889-stakeholder-institutional>).
4. **Share Issuance Transaction** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559890-share-issuance-convertible-issuance-warrant-issuance-share-buyback-transaction>).
5. **Convertible Issuance Transaction** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559890-share-issuance-convertible-issuance-warrant-issuance-share-buyback-transaction>).
6. **Warrant Issuance Transaction** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559890-share-issuance-convertible-issuance-warrant-issuance-share-buyback-transaction>).
7. **Share Buyback Transaction** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559890-share-issuance-convertible-issuance-warrant-issuance-share-buyback-transaction>).
8. **Share Transfer Transaction** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000559893-share-transfer-transaction>).
9. **Share Class** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560830-share-class-convertible-class-warrant-class>).
10. **Convertible Class** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560830-share-class-convertible-class-warrant-class>).
11. **Warrant Class** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560830-share-class-convertible-class-warrant-class>).
12. **User Invitations** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560833-user-invitations>).
13. **Employee Option award Bulk Upload** (<https://qapita-fintech.freshdesk.com/support/solutions/articles/72000560843-employee-option-award-bulk-upload>).

4. Click on **Download Template** or **Download Template with Data (If you want to add or modify the data already present)**

5. Update the template and upload the modified template. If there are any errors, the system will let you download the error spreadsheet. Please make corrections in the uploaded file and begin the uploading process. _

6. Upload the **Support Documents** if any.

7. **Submit** data to system.