

Documents preparation for Private Placement

A new corporate action has been added to the dashboard. Now you may prepare the documents for share allotment via private placement very easily. Follow the procedure as explained below to access this feature.

Dashboard ⇒ Clients ⇒ Select Client ⇒ Compliance Manager
⇒ Masters ⇒ Shareholder ⇒ Share Allotment

Or you can go to share allotment from corporate actions :

Dashboard ⇒ Clients ⇒ Select Client ⇒ Compliance Manager
⇒ Corporate Actions ⇒ Share Capital ⇒ Share Allotment

Following screen will be displayed to you:

#	Date of Allotment	Type of Share	Number of Allotees	Action
1.	08 Oct 2021	Equity Share Class A(With Voting Rights)	2	Edit ⚙ Download ⬇
2.	29 Oct 2021	Equity Share Class A(With Voting Rights)	1	Edit ⚙ Download ⬇

For Adding new entry go to ADD ALLOTMENT button.

Fill all the information and submit

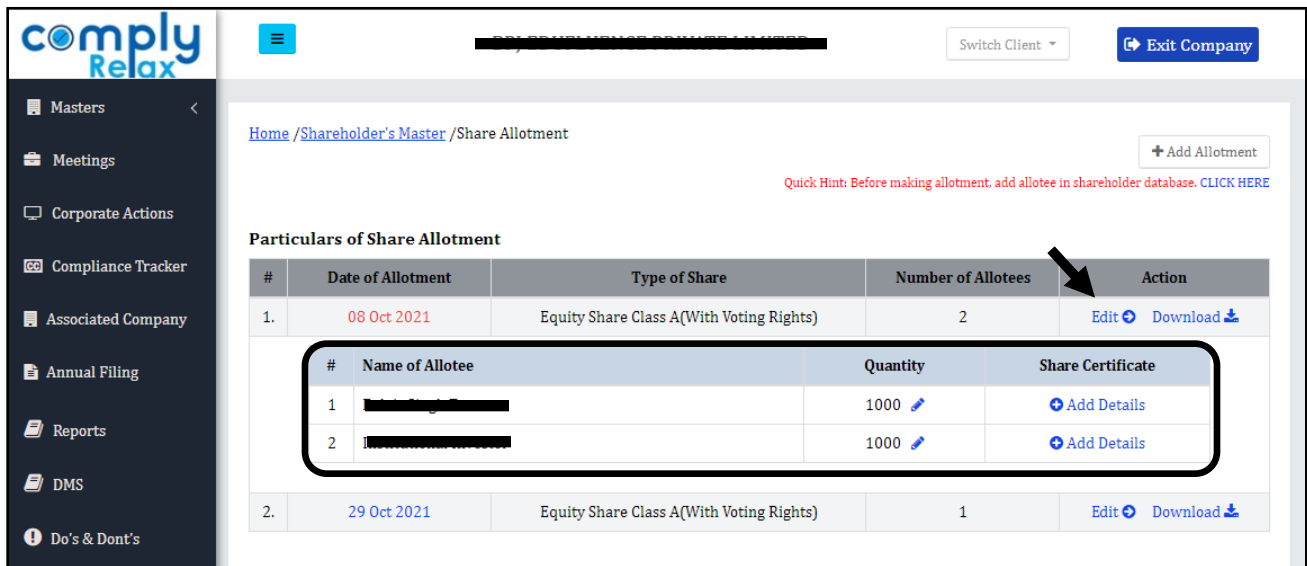
After filling all the information you will be able to download the documents like list of allottees, PAS-4 and PAS-5 using the documents section.

**System will create meetings automatically with the information that you will fill in the "Meeting Details" tab. Necessary agenda for approval of allotment will also be added in the board meeting and general meeting.*

You can go to meetings tab for reviewing or downloading meeting related documents.

EDIT PROCESS:

All the details of allotment can be edited using the edit button as shown in the image below:



***For editing the quantity of shares allotted:**

Click on the date of allotment and a separate table of allottees will be displayed as shown in the figure; click on the edit icon as available under the quantity head.