Import shareholder's data using excel template

Dear users,

Greetings of the Day!

We have added the facility on ComplyRelax for importing the data of shareholders using excel template.

You have to follow the steps as mentioned herewith in the same sequence.
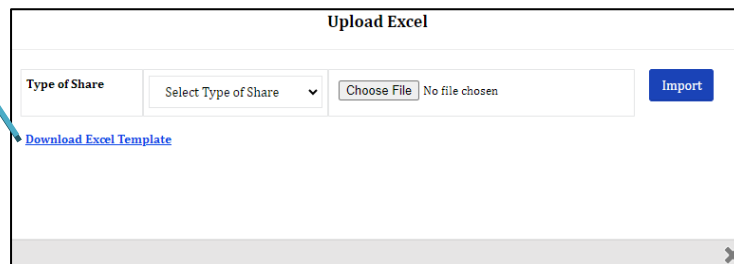
Steps to be followed:

1. **Update the capital structure of the company properly.**

2. **Add Shareholders:**

Dashboard ⇨ Clients ⇨ Select Client ⇨ Compliance Manager ⇨ Masters ⇨ Shareholder Master ⇨ Import Excel

If you follow these steps, following pop up will open.

Using this option download the excel template.

Upload Excel

| Type of Share | Select Type of Share | Choose File No file chosen | Import |

Download Excel Template

After completing the excel, select the type of share and upload the excel file here.

Please make sure to add the following input from the dropdown available in the sheet only:

- **Gender**
- **Status**
- **Mode**
- **Whether this shareholder has a valid DIN**
- **Category**
- **Subcategory**
- **Under sub-category**

The shareholder's details will be added and then you can add their share certificate details accordingly. For MOA subscribers, use the option of "Add Certificate" in the shareholder master window, as shown in the following figure:

After successfully adding these details, you may add the next transaction – transfer / transmission / allotment, as the case may be.

Please note that the transactions are to be added in CHRONOLOGICAL ORDER only.

IMPORTING ALLOTMENT DATA:

You can also import allotment's data by excel template.

Dashboard ⇨ Clients ⇨ Select Client ⇨ Compliance Manager ⇨ Masters ⇨ Shareholder Master ⇨ Shareholder Mgmt. ⇨ Share Allotment ⇨ Import from Excel

You will be redirected to the following window:

Enter the information and select the complete excel template. Once you click on submit button your allotment data will be saved and relevant share certificate be created.