

### 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:**

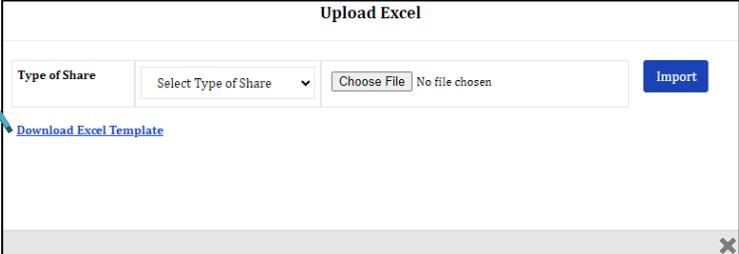
1. Update the capital structure of the company properly.

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.



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:

Home / Masters / Shareholder's Master

(With Voting Rights 1) Import Excel Import SPICE Report Extract List Add Shareholder Shareholder Mgmt

Quick Hint: Before making transfer or allotment, add allottee or transferee in shareholder database. [CLICK HERE](#)

**Particulars of Shareholders**

Show 10 rows Excel Column visibility Search: \_\_\_\_\_

#	Shareholder Name	Father Name	Address	Category	Type of share	Folio	Number of Share	Action	Share Certificate
1				Individual	(With Voting Rights Equity Shares	3	2.000		Add Details
2				Individual	(With Voting Rights Equity Shares	01	3.000		Edit Details

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:

Home / Share Capital / Share Allotment / Import Excel Back

**Particulars of Allotment**

Type of Allotment: Select Type of Allotment Premium per Share: Premium

Type of Share: Select Type of Share Date of Allotment: Date of Allotment

Nature of Consideration: Nature of Consideration Are all the shares fully paid?  Yes  No

Director 1: Select Director 1 Director 2: Select Director 2

Upload Excel: Choose File No file chosen [Download Excel Template](#)

Submit

Download excel template from here.

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.