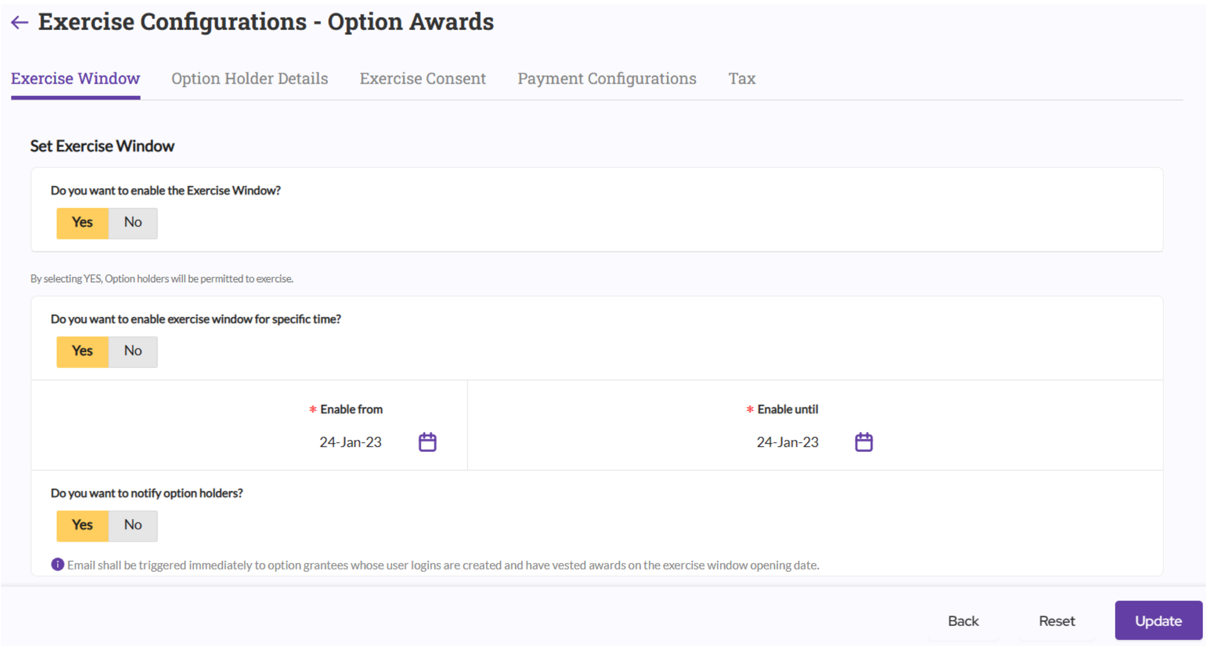
Exercise Window Configuration

Modified on: Thu, 23 Mar, 2023 at 2:08 PM

This document gives you an insight into different configurations that are available for Employee Exercise workflow.
Navigation: Go to Settings -> Configurations -> Exercise Window configurations
Exercise Window

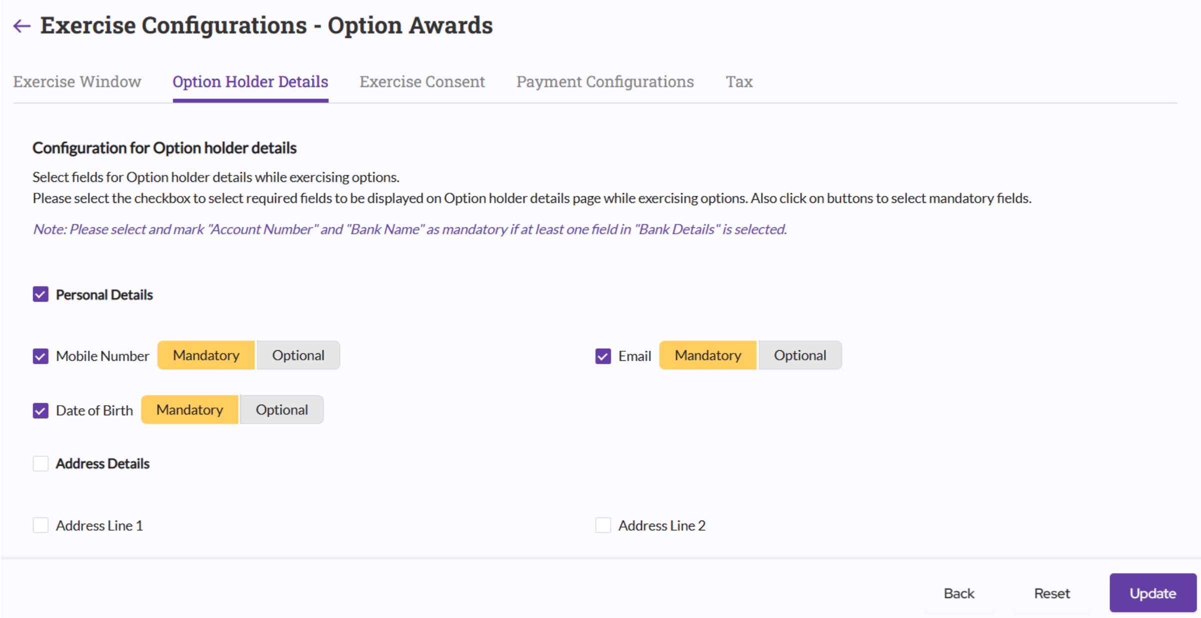
This setting allows you to permit Option holders to exercise their options. The changes you make in these settings will impact on your employees' ability to transact on their awards visible in the employee login.



1. Click **Yes** in the **Do you want to enable the Exercise Window?** field to permit Option holders to exercise their options.
2. If you want to set a time duration, click **Yes** in the **Do you want to enable exercise window for specific time?** field.
3. Select the appropriate dates in **Enable from** and **Enable until** field to specify the allowed timeframe for your employees to transact.
4. Click **Yes** in the Do you want to notify option holders? Email will be triggered to the option grantees on the exercise window opening date.
5. Click **Update**.

Option Holder Details

This tab allows admin to configure the fields s/he wants to display for their employees while exercising the vested options.
Create your own custom fields and make them Mandatory or Optional as per your choice.
The changes you make in this setting are visible while the employee is trying to exercise their options.

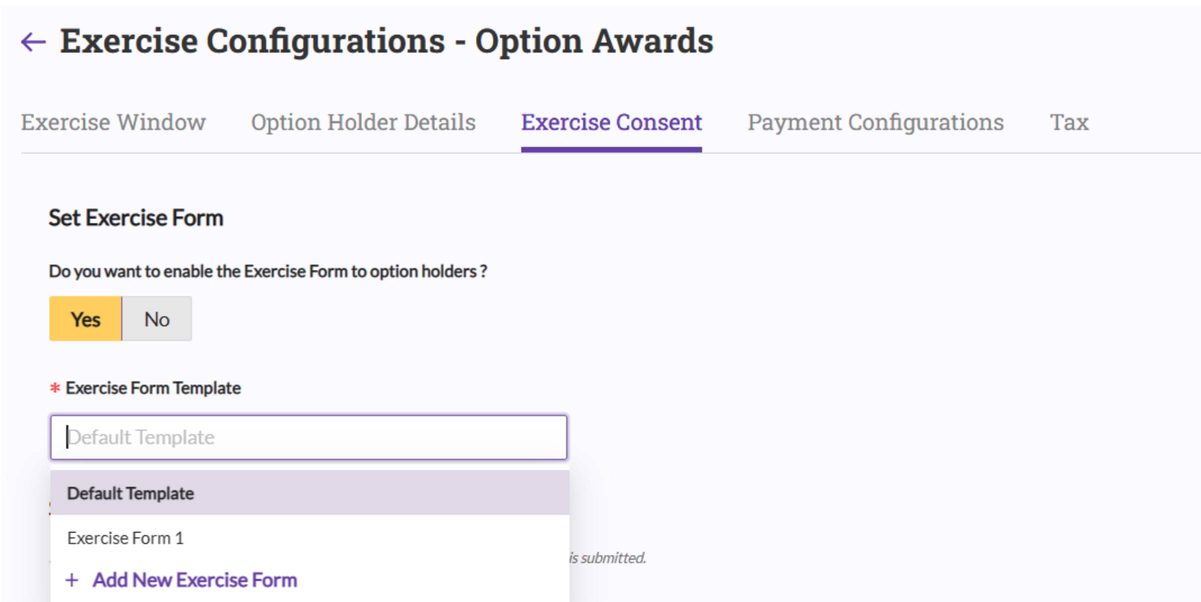


6. Select the checkbox to select required fields to be displayed on Option holder details page while exercising options.
7. Click **Mandatory** if you want to make a field compulsory.
8. To add more custom fields, refer to the Stakeholder document for more information.
9. Click **Update** to complete the process.

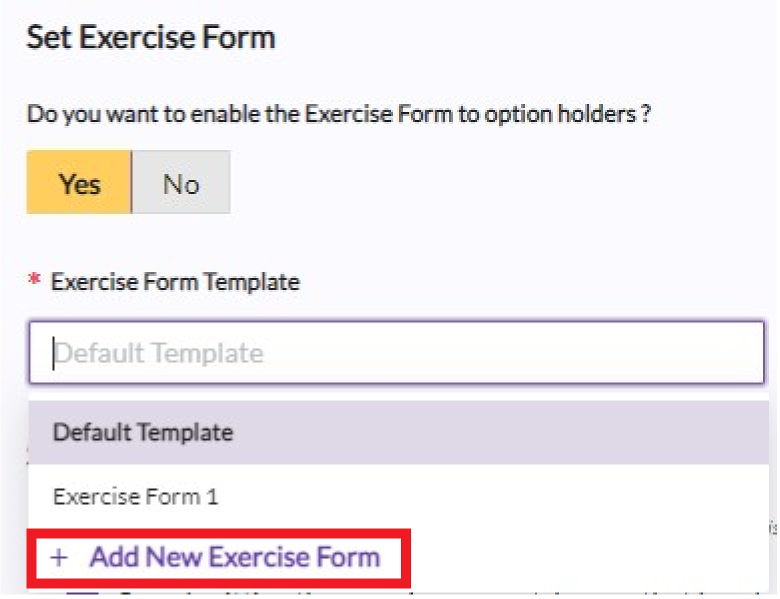
Exercise Consent

This tab allows admin to configure an additional form to the exercise flow which helps company to communicate the terms and conditions involved while exercising the vested options.

10. The default option is set to “No” for Exercise Form.
11. Click on “Yes” to enable the Exercise Form.
12. Select the Created or Default Template available and Click on Update button to save the configuration.



13. If you want to create a New Exercise Form template, click on the Exercise Form Template drop-down and click “+ Add New Exercise Form”, you will be redirected to the Templates module for creating a new document.



14. Select **Default** to display the standard message.
15. If you want to display a custom message, select **Custom Message**, type the message, and click **Update**.

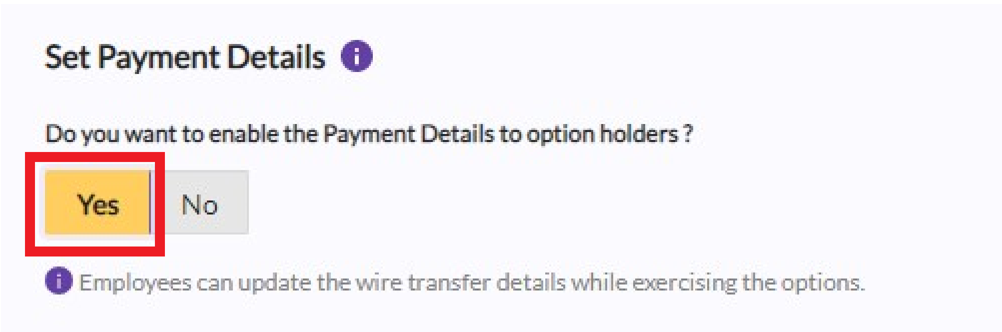
Payment Configurations

16. You can now configure the Payment Details tab on the Exercise Window (employee login), which will let the employee update the wire transfer details during the time of Exercise Submission.

a) Default option is set to NO.

b) Click on YES, to enable the payment details window.

c) Click on the Update button to save the configuration.

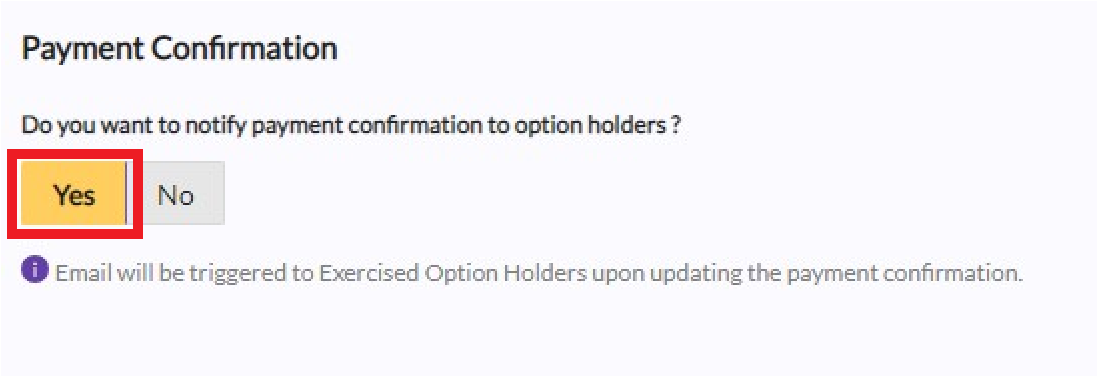


17. You can now notify the option holders upon configuring the Notify Payment Confirmation to YES.

a) Default option is set to NO.

b) Click on YES, to enable the notify option.

c) Click on the Update button to save the configuration.



Tax Configuration:

18. You can refer to the following **Help Article** (https://qapita-fintech.freshdesk.com/support/solutions/articles/72000543628-equity-award-tax-configuration) for configuring Tax Setting on Exercise Window.