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# Genesys Engage cloud Workforce Management 8.5.1 Guide

Notification of Schedule Trade Status Changes

5/8/2025

# Notification of Schedule Trade Status Changes

#### Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

To configure notifications of schedule trade status changes, you must have the permission assigned in WFM Web. See Roles and Notification Role Privileges in this Help.

To bring up the module for notification of schedule trade status changes:

- 1. Select the **Configuration** tab.
- Select Notifications from the Views menu. The Objects tree highlights Schedule Trades Status Changes. The Working pane shows the Messages tab where you configure the message Subject, Body, and variables (Tokens).

#### Messages Tab

The Messages tab has three areas:

- Tokens. This area contains buttons for inserting tokens into the message body. Available tokens related to agent schedule trades are: Proposing Agent, Responding Agent, Requested Dates, Requested Status, Submission Date, Expiration Date.
- **Subject**. This area contains Genesys-supplied subject text, which you can modify by changing text and inserting variables (**Tokens**). The supplied text is:

Message from Genesys Workforce Management: Schedule trading status changed.

• **Message Body**. This area also contains Genesys-supplied body text, which you can modify by deleting/ typing over text and inserting tokens. The supplied text is:

The schedule trade proposal for <Proposing Agent> and <Responding Agent> for the date(s) <Dates> has been updated with the status of <Status>. Trade proposal submission date is <Submission Date>. It will expire on <Expiration Date>.

# Modifying the Message

To modify the message subject or body text:

- 1. Delete/type over text.
- 2. Place the cursor where you wish to insert a token.
- 3. Click the appropriate **token** button. The token gets inserted.
- 4. Click **Save** on the toolbar. If you switch to another notification type without saving, a message asks if you wish to save or cancel.

## Targets Tab

Use the **Targets** tab to select business units and/or sites within business units. You can expand business units to display their sites. You can select multiple sites.

# Rules for Sending

After a successful save, WFM uses the specified **Subject** and **Body** and the rules listed below when sending notifications to agents and supervisors. In the rules below, the proposing agent is one creating the trade request; the responding agent is the one receiving the proposal.

- Both the proposing and responding agents associated with the selected sites get notified when a trade status is **User-declined**, **User-approved**, **Auto-declined**, **Auto-approved**, or **Cancelled**.
- Supervisor(s) associated with the selected sites get notified when a trade status is **Pending**.
- The responding agent gets notified when the status of a trade proposal is In Review or Open.
- The proposing agent gets notified when the response status of a trade proposal is **Accepted**, **In Review**, or **Cancelled**.

### Double-Handshake Trade Proposals

A double-handshake trade proposal works as follows: When Agent A creates a trade proposal for Agent B (or for the community), there is a check box that asks whether or not the agent wants to manually approve the response: Check if you want to manually approve response to this trade proposal.

If this box is not checked, the order of events is:

- 1. Agent A creates proposal.
- 2. Agent B accepts proposal.

3. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

If the box is checked, a double-handshake proposal is created. The order of events is then:

- 1. Agent A creates proposal.
- 2. Agent B accepts proposal.
- 3. Agent A needs to approve the response from Agent B.
- 4. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

The extra approval step (3) allows Agent A to re-confirm that he wants the trade to go through.