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Genesys Engage cloud Workforce Management 8.5.1 Guide

Notification of Schedule Trade Status Changes

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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.
2. 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.