Workforce Management Web for Agents Help (Classic)

Creating Trade Proposals

5/4/2025

Creating Trade Proposals

Use the Create Trade Proposals window to propose a schedule trade:

1. In the first column of the Schedule view, select the check boxes beside the schedule days that you want to trade. Then click **create trade proposals**.
   The Create Trade Proposals window opens. Its first line lists the date(s) that you just selected.
   Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

2. Select either **This trade proposal is for an individual** or **This trade proposal is for the community**.
   The community option includes agents on your team or agents at your site, depending on how your system administrator has set up WFM Web.

3. If you choose the individual option, select the agent's name from the drop-down list.
   The list includes agents on your team or at your site, depending on how your system administrator has set up WFM Web
   If you choose the community option, you cannot select individual names here.

4. If you choose the individual option, you can also select **Check if you want to manually approve response to this trade proposal**.
   Selecting this check box means that for the trade to take place, you must explicitly confirm the other agent's acceptance of this proposal.
   Clearing the box means that once the other agent accepts it, the trade will immediately be submitted for approval, without your intervention.
   If you choose the community option, you cannot clear this check box. You must confirm (accept) one response to submit the trade for approval.

5. Optionally, enter comments about this proposal in the large text box near the bottom. You can only enter comments if your system administrator has enabled the Comments feature.

6. Click **Submit** to send the proposal, or **Cancel** to delete it without sending it.