GENESYS

Workforce Management Web for Agents Help (Classic)

Trading

5/3/2025

Trading

The Trading message box, near the bottom of the window, alerts you to any open trade proposals or responses.

The trading windows—if your system administrator has enabled them—help you obtain more convenient schedules by trading with other agents. This help topic first describes the whole trading process (How Trading Works) and then breaks it down into steps (Requirements for a Successful Trade). For step-by-step instructions, see the Trading Windows Road Map.

Using the eight trading windows, you can:

- Create schedule trade proposals.
- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View other agents' schedules or schedule details.

How Trading Works

A trade can include up to one full week of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either automatic (by WFM Web) or explicit (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team or site.

If a trade is approved, it executes: both agents' schedules change to reflect it, and the trade no longer appears in most trading windows. (However, all of your own proposals still appear on the My Proposals tab even after WFM Web executes the corresponding trades.)

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM Web automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur

Requirements for a Successful Trade

For a trade to take place, all the following steps must occur.

- One agent creates a community or personal trade proposal.

- At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.

- The proposing agent accepts a response to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)

- The trade receives either WFM Web's automatic approval or a supervisor's explicit approval.