



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Workforce Management Web for Supervisors Help

Trading

Trading

Use the Trading module to review, and accept or decline, agents' proposed schedule trades. The features of this module are:

- A [List of Trades](#).
- Ability to add [Trading Comments](#).
- A [Schedule Details](#) window.

Important

If you do not see Trading information, or cannot configure objects or change settings in Web for Supervisors, you might not have the appropriate role privileges. See [Trading Role Privileges](#) in this Help. Also, you must configure WFM Web to initiate trading for agents. See the [Workforce Management Configuration Options Reference](#).

Using the List of Trades View

The [List of Trades](#) view displays a week's schedule trading information for a single site at a time. Controls enable you to view [details](#) about each trade, to accept or decline the trade, and to enter [comments](#) about your decision.

Trade proposals appear in the List of Trades view if they meet the following criteria:

- The trade has not been automatically approved. Automatic approval is based on WFM's built-in trade rules or on exception types' own configured trade rules.
- The trade has not been automatically cancelled. WFM automatically cancels a proposed trade if either agent's schedule has been modified in some way in the Master Schedule since the trade request was made. For example, a supervisor has explicitly modified the agent schedule; or another trade, with overlapping schedule data, has been approved and executed.
- The trade has not been automatically declined. WFM automatically declines a proposed trade if either agent's schedule overlaps with overnight schedule from the previous day for a recipient agent.
- The trade has not yet been explicitly [approved or declined](#) by any supervisor. (Once acted upon, trades no longer appear.)

If a trade proposal has not been approved or declined by its effective date, the proposal expires and the trade does not occur.