GENESYS

Workforce Management Web for Supervisors Help

How Trading Works

5/7/2025

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How Trading Works

The topics on this page describe how a schedule trade proceeds to approval or rejection.

> ### Tip
> If you do not see Trading information 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*.

Trading Summarized

A trade can include up to six full weeks 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, either automatically by WFM or explicitly 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, site, or business unit (if multi-site trading is permitted).

If a trade is approved, WFM executes it and both agents' schedules are changed to reflect it. After execution, WFM removes the trade from the **Trading** > **List of trades** view and you will see it only in the Schedule Trade report.

Not all trades are approved. For example:

- Under certain conditions (when one agent is not qualified for the other agent's scheduled activities), WFM automatically declines a trade.
- If either agent's schedule is changed before a pending trade's approval, the trade is automatically canceled.
- A supervisor may explicitly decline a 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 of the following steps must occur. (See the *Workforce Management Web for Agents Help* for details about how agents perform the first three steps.)

- 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's automatic approval or a supervisor's explicit approval.

> ### Tip
> At any time before approval, a pending trade can fail in one of three ways: either agent can cancel it; the trade can automatically be canceled if either agent's schedule is changed; or the trade can expire.

How Trades are Tested for Automatic Approval

Once both agents have accepted a trade proposal, WFM tests it for automatic approval. These tests evaluate the trade using the conditions listed in each of the following sections:

Exceptions' Trade Conditions

If either agent has a scheduled exception on any of the days to be traded, WFM tests the trade against the trade rules configured for that exception type. For example, exceptions that count as vacation time always have either the **Delete**, **Keep with agent**, or **Do not trade** rule.

Here is how WFM acts on each trade rule:

Exception Trade Rule:	How WFM Responds:
Delete	Allows the trade to proceed to the next test, but deletes the exception from the schedule.
Do not trade	Agent is not allowed to create trading proposal on day with scheduled exception "Do not trade".
Keep with agent	Allows the trade to proceed to the next test, but keeps the scheduled exception with the original agent.
Keep with schedule	Allows the trade to proceed to the next test, and trades the exception along with the schedule.

Auto-Decline Conditions

WFM automatically declines a trade if either agent's schedule overlaps with the overnight schedule from the previous day for a recipient agent.

If multi-site trading is permitted, WFM automatically declines a trade if:

- A scheduled shift cannot be matched with a shift on another site
- A scheduled exception type is not available on another site
- A scheduled marked time is not available on another site
- A scheduled time-off item is not available on another site

Supervisor Approval Conditions

WFM places a trade "in review"—a status that requires a supervisor to approve the trade—if the trade involves any of the following conditions:

- The traded schedules have different paid hours.
- Either agent is trading days off for working days.
- Either agent has a scheduled exception with the delete rule enabled.
- Either agent is trading a keep with agent exception for fixed-staff work.
- The trade violates an agent's availability (contract availability, granted availability preferences, or rotating availability).
- The trade violates certain contract terms or site rules: minimum or maximum working hours per day or per week; minimum or maximum days off per week; or minimum time off between consecutive working days.

Auto-Approval Conditions

If a schedule trade does not match any of the Auto-Decline or Supervisor Approval conditions, WFM automatically approves it and trades the schedules.

Auto-Cancel Conditions

WFM automatically cancels a trade proposal, a response, or a pending trade in review if either agent's schedule is modified in the Master Schedule. Examples of auto-cancel conditions are:

- A supervisor explicitly modifies either agent's schedule.
- Another trade is approved and executed for either agent that involves a schedule period that overlaps with the schedule period for this trade.

Expiration Conditions

If a trade has not received approval by the day before its first included day, it expires, and can no longer be approved by any agent or supervisor.