Workforce Management Agent Help

Managing multi-site trade proposals

7/17/2025

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- Agent

Customize this view to display the proposals you want to see and easily find detailed information about trading agents, proposals, and schedules.

Related documentation:

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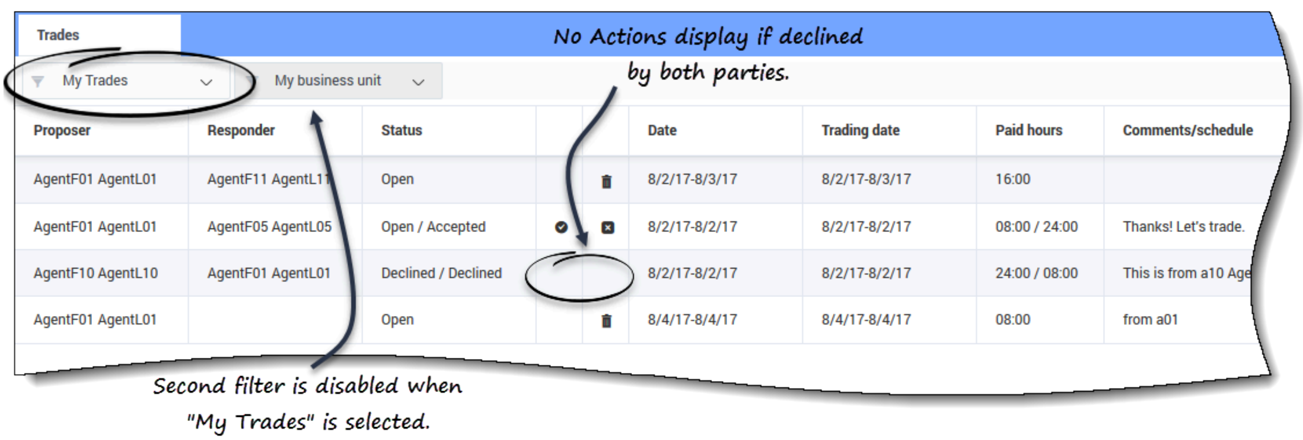
Filtering the Trades view

WFM enables you to filter trade proposals in the **Trades** view by My Trades, Offered to me, or Community proposals. WFM displays all proposals whose date range falls within the selected month. By default, it shows the current month, but you can change it by selecting a different month in the calendar.

Managing trade proposals sent by you



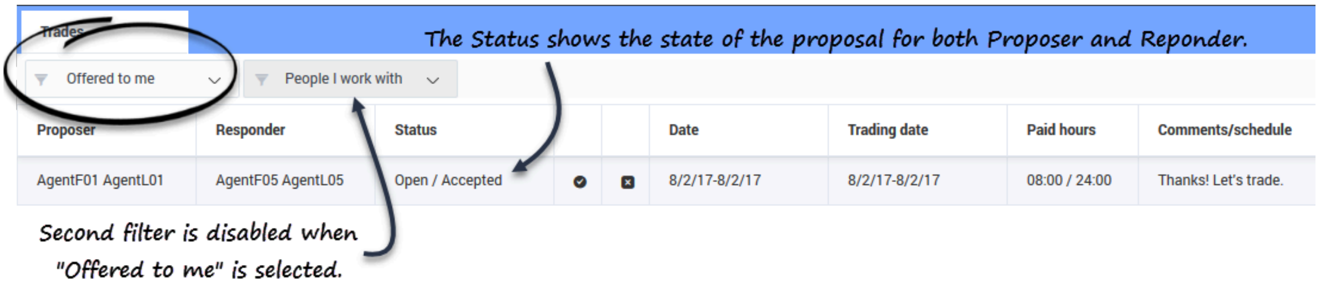
Click the filter drop-down menu and select **My Trades**. WFM displays the trade proposals that you created, and proposals from other agents that you answered (offered only to you and offered to the community).

You can view your proposals and their details, accept or decline other agents' trade proposals, and cancel your proposals or responses.

The **Status** column in this view shows the state of each trade for each participant—the **Proposer** and the **Responder**—in this format: **Open / Accepted**.

Click the anywhere in a selected row to open the Proposal Details.

Managing trade proposals offered to you



Click the filter drop-down menu and select **Offered to me**.

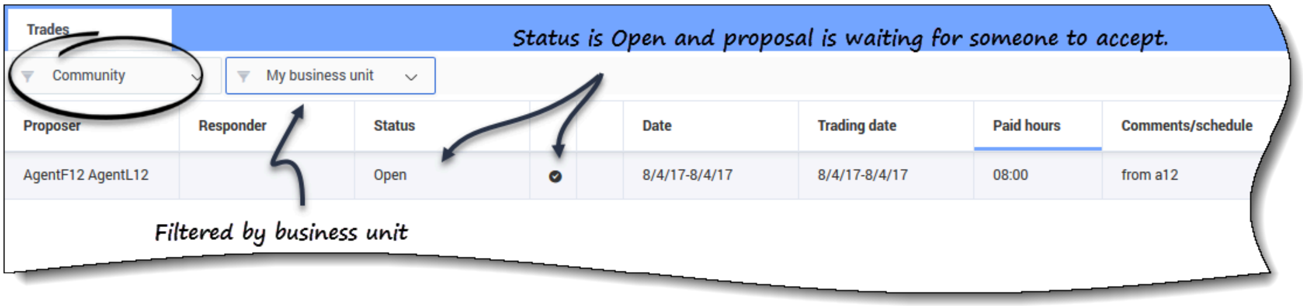
WFM displays the trade proposals that were offered to you and personal trade proposals created by you that require your confirmation.

You can view these proposals and their details, accept or decline them.

After you accept or decline a proposal, this trade is removed from the **Offered to me** proposals but remains in the **My Trades** list of proposals.

> **Tip**
>
> You can distinguish between community and individual proposals by the action icons available to you. Community proposals only have the **Accept** icon, whereas individual proposals have both **Accept** and **Decline**.

Managing trade proposals sent to the community

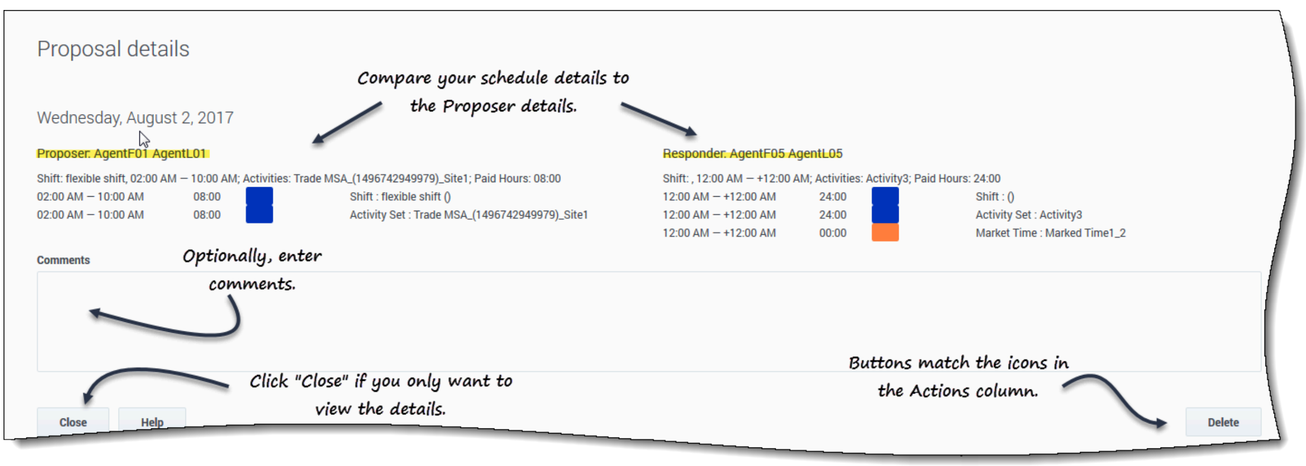


Click the filter drop-down menu and select **Community**. WFM displays only the trade proposal that were sent by other agents to the community.

You can view these proposals and their details, and accept them.

After you accept a proposal, this trade is removed from the **Community** proposals, but remains in the **My Trades** list of proposals.

Viewing proposal details



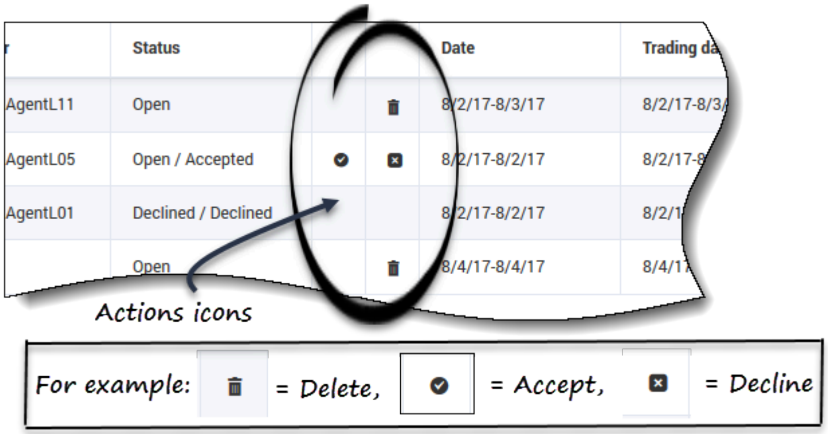
You might want to view the details for schedule trade proposal before taking any action. To do so, click anywhere in the row containing the proposal.

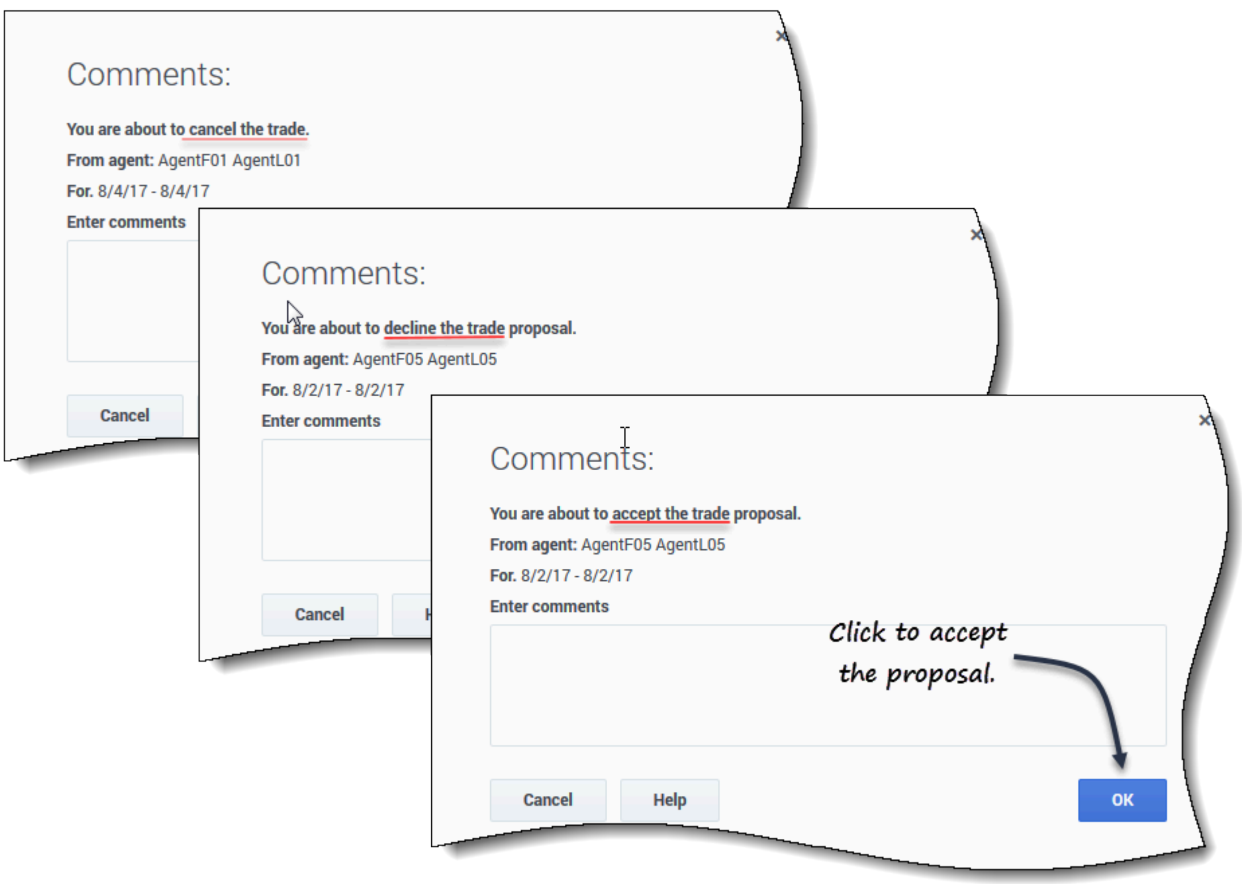
The **Proposal Details** dialog opens, containing the following information:

- The date of the proposed trade
- The name of the proposing agent
- The name of the responding agent (if an agent has responded)
- The schedule details, including: shift, activities, paid hours, marked time, and duration
- A **Comments** field

- **Action**, **Close**, and **Help** buttons

Responding to trade proposals





You can respond to trade proposals in one of two ways:

1. In any of the three filtered **Trades** views, click the **Action** icon in the table that matches your choice. **The Comments dialog opens, enabling you to add comments and respond.**
2. When the **Proposal Details** dialog is open, click the **Action** button in the bottom-right corner. (See Viewing proposal details.