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Workforce Management Agent Help

Managing multi-site trade proposals

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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

Trades		No Actions display if declined by both parties.					
My Trades		My business unit					
Proposer	Responder	Status		Date	Trading date	Paid hours	Comments/schedule
AgentF01 AgentL01	AgentF11 AgentL11	Open		8/2/17-8/3/17	8/2/17-8/3/17	16:00	
AgentF01 AgentL01	AgentF05 AgentL05	Open / Accepted	☑ ✕	8/2/17-8/2/17	8/2/17-8/2/17	08:00 / 24:00	Thanks! Let's trade.
AgentF10 AgentL10	AgentF01 AgentL01	Declined / Declined	☒	8/2/17-8/2/17	8/2/17-8/2/17	24:00 / 08:00	This is from a10 Age
AgentF01 AgentL01		Open		8/4/17-8/4/17	8/4/17-8/4/17	08:00	from a01

Second filter is disabled when "My Trades" is selected.

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

The Status shows the state of the proposal for both Proposer and Responder.

Proposer	Responder	Status	Date	Trading date	Paid hours	Comments/schedule
AgentF01 AgentL01	AgentF05 AgentL05	Open / Accepted	8/2/17-8/2/17	8/2/17-8/2/17	08:00 / 24:00	Thanks! Let's trade.

Second filter is disabled when "Offered to me" is selected.

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

Trades							
Status is Open and proposal is waiting for someone to accept.							
Community		My business unit					
Proposer	Responder	Status		Date	Trading date	Paid hours	Comments/schedule
AgentF12 AgentL12		Open	⊙	8/4/17-8/4/17	8/4/17-8/4/17	08:00	from a12

Filtered by business unit

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

Proposal details

Wednesday, August 2, 2017

Proposer: AgentF01 AgentL01

Shift: flexible shift, 02:00 AM – 10:00 AM; Activities: Trade MSA_(1496742949979)_Site1; Paid Hours: 08:00
 02:00 AM – 10:00 AM 08:00 [Blue square icon]
 02:00 AM – 10:00 AM 08:00

Responder: AgentF05 AgentL05

Shift: 12:00 AM – +12:00 AM; Activities: Activity3; Paid Hours: 24:00
 12:00 AM – +12:00 AM 24:00 [Blue square icon] Shift: ()
 12:00 AM – +12:00 AM 24:00 [Orange square icon] Activity Set: Activity3
 12:00 AM – +12:00 AM 00:00 Market Time: Marked Time1_2

Comments

Optionally, enter comments.

Click "Close" if you only want to view the details.

Buttons match the icons in the Actions column.

Close Help Delete

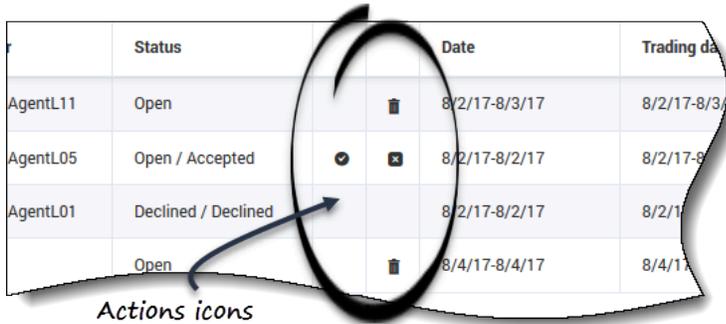
You might want to view the details for schedule trade proposal before taking any action. To do so, click anywhere in the row containing the proposal.

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

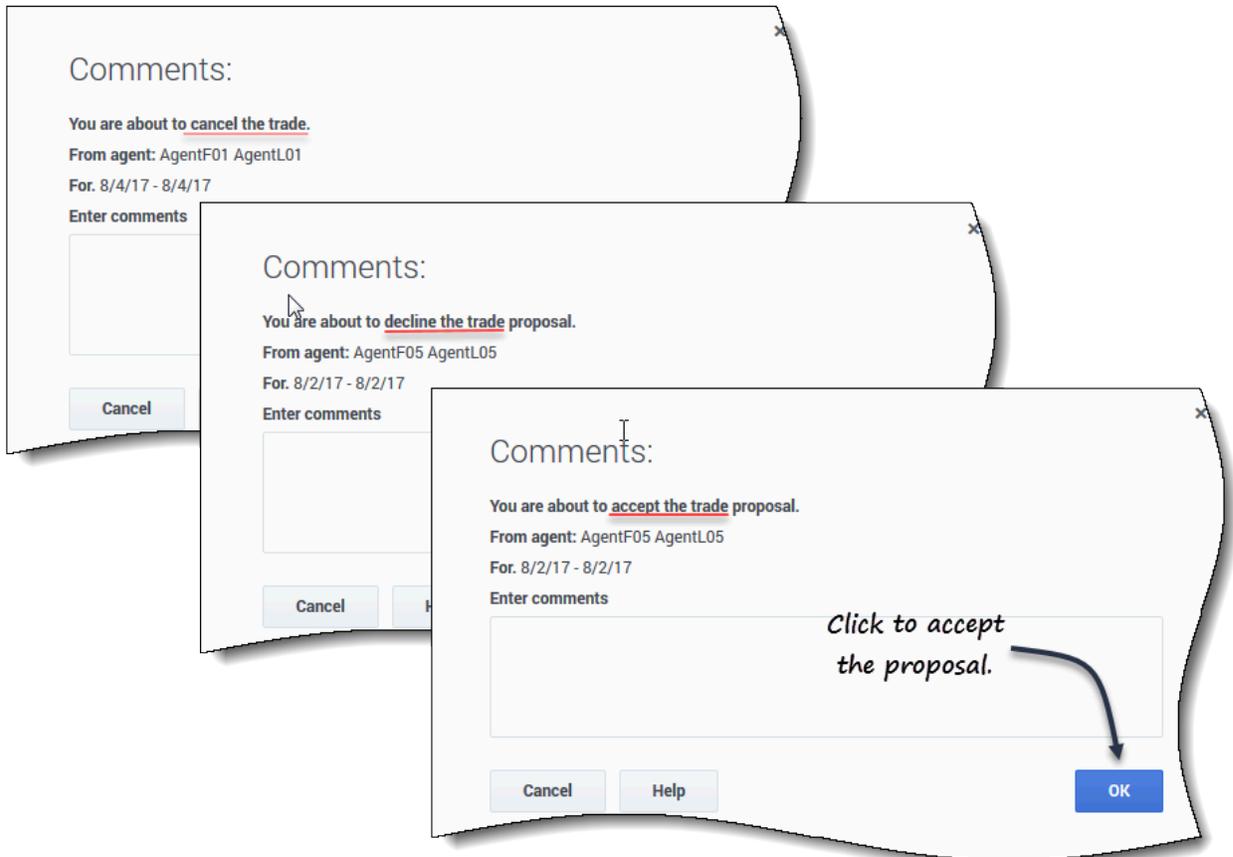
Responding to trade proposals



	Status		Date	Trading da
AgentL11	Open	🗑️	8/2/17-8/3/17	8/2/17-8/3/17
AgentL05	Open / Accepted	✅	8/2/17-8/2/17	8/2/17-8/2/17
AgentL01	Declined / Declined	❌	8/2/17-8/2/17	8/2/17-8/2/17
	Open	🗑️	8/4/17-8/4/17	8/4/17-8/4/17

Actions icons

For example: 🗑️ = Delete, ✅ = Accept, ❌ = Decline



Comments:

You are about to cancel the trade.

From agent: AgentF01 AgentL01

For: 8/4/17 - 8/4/17

Enter comments

Cancel

Comments:

You are about to decline the trade proposal.

From agent: AgentF05 AgentL05

For: 8/2/17 - 8/2/17

Enter comments

Cancel

Comments:

You are about to accept the trade proposal.

From agent: AgentF05 AgentL05

For: 8/2/17 - 8/2/17

Enter comments

Click to accept the proposal.

Cancel Help OK

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.)