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Workforce Management Agent Help

Multi-site trading

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Trade scheduled work days with agents at other sites.

Related documentation:

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If multi-site trading is permitted in your contact center, you can use the **Trades** view in the **Trading** module to obtain more convenient schedules by trading with other agents. You can filter the view to show: My Trades, Offered to me, or Community proposals.

Tip

You might or might not be able to trade with agents in other sites, depending on how your administrator or supervisor has set up your site and team. If you cannot see agents from other sites in your **Trades** view, multi-site trading might not be set up for your team. In that case, see [Viewing proposals and my trades](#).

Using the **Trades** view, you can:

- 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 trade participants' schedule and proposal details.

Tip

You create schedule trade proposals in the [My Schedule](#), [My Schedule Details](#), or [Other Schedules](#) view.

Columns and controls

The screenshot shows the 'Trades' view in the Workforce Management application. The interface includes a menu bar with options like 'Trades', 'Schedule', 'Preferences', 'Time Off', 'Bidding', and 'Configuration'. Below the menu, there are two dropdown filters: 'My Trades' and 'People I work with'. A checkbox labeled 'Filter by primary activities only' is checked. The main area displays a table with columns: Proposer, Responder, Status, Date, Trading date, Paid hours, and Comments/schedule. Annotations with arrows point to the filters, the 'Filter by primary activities only' checkbox, and the 'Trading date' column. A 'Settings' icon is also annotated. A 'Settings' dialog box is shown in the bottom right, with a 'Show Columns' section containing a checked checkbox for 'Trading date'. The dialog has 'Cancel', 'Help', and 'OK' buttons.

Use the filters in this view to see only the select proposal type.

Click "Settings" to change the columns displayed in this view.

By default, this column is not displayed.

Enter a check mark to display this column in the grid.

The **Trades** view has the following controls and settings:

- **Filters**—There are two. Use the first filter to view only **My Trades**, **Offered to me**, or **Community** proposals. Use the second one only for **Community** proposals (it's disabled if you select **My Trades** or **Offered to me** in the first filter). Filter by:
 - **People I work with**
 - **My shared transport**
 - **My team**
 - **My site**
 - **My business unit**
- **Date selectors**—Use the forward and backward arrows to change the date by month, or click the **Calendar** icon and choose the month.
- **Settings**—Click this icon to change the display settings. In this dialog, selecting the check box displays the **Trading date** column in the grid. This is useful when your timezone (in **My Settings**) is different from the site timezone.

The **Trades** view has the following columns:

- **Proposer**—The name of the agent who sent the trade proposal.
- **Responder**—The name of the agent who responded to the trade proposal.
- **Status**—The status of the trade proposal. For example, **Open**, **Accepted**, **In Review**, **Confirmed**, **Declined**, **Cancelled**, or **Expired**. For a description of each status, see **Trade statuses**.
- **Date**—The date on which the trade proposal was created, in the time zone set in **Time zone** drop-down list in the **My Settings** view.
- **Trading date**—The date of the schedule trade in the site time zone.
- **Paid hours**—The total number of paid hours covered by the proposed trade.

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- **Comments/schedule**—Any comments entered by the proposing agent, supervisors, or those auto-generated by WFM that relate to this trade proposal or schedule.

Tip

The **Trading date** might differ from date that you see in WFM Web, if the time zone in **My Settings** is set to anything other than the site time zone. To see the **Trading date** column in the grid, you must select the check box in Settings. By default, it is not displayed.