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Workforce Management Agent Help

Multi-site trading

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- Agent

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 top navigation bar includes 'Workforce Management', 'Schedule', 'Trades' (selected), 'Preferences', 'Time Off', 'Bidding', and 'Configuration'. The user is logged in as 'AgentF01 AgentL01'.

Annotations on the screenshot:

- Filters:** Two dropdown menus are circled: 'My Trades' and 'People I work with'. A note says: "Use the filters in this view to see only the select proposal type."
- Filter by primary activities only:** A checkbox is checked.
- Date selectors:** A date range 'August 1, 2017 - August 31, 2017' is shown with forward and backward arrows. A note says: "Click 'Settings' to change the columns displayed in this view."
- Trading date column:** A note points to the 'Trading date' column header: "By default, this column is not displayed."
- Settings dialog:** A dialog box titled 'Settings' is shown with a 'Show Columns' section. The 'Trading date' checkbox is checked. A note says: "Enter a check mark to display this column in the grid."

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	8/2/17-8/2/17	8/2/17-8/2/17	08.00	
AgentF10 AgentL10	AgentF01 AgentL01	Open	8/2/17-8/2/17	8/2/17-8/2/17	24.00	This is from a10
AgentF01 AgentL01		Open	8/4/17-8/4/17	8/4/17-8/4/17	08.00	from a01

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.