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Workforce Management Agent Help

Managing single-site trade proposals

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Contents

- 1 Reviewing other agents' proposals
 - 1.1 About the Proposals table
- 2 Accepting or declining a proposal
 - 2.1 Watch: Accepting a personal or community trade proposal
- 3 Reviewing responses to proposals
 - 3.1 About the Trades table
- 4 Canceling a pending response
 - 4.1 More trade statuses



- Agent

Review and manage your shift trade proposals and responses.

Related documentation:

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Use the **Trading** views (Proposals and My Trades) to review proposals and responses by performing the tasks described in this topic. Use the **Schedule** views to create trade proposals.

Reviewing other agents' proposals

Use the **Proposals** view to:

- Review trade proposals that another agent has sent specifically to you.
- Review trade proposals that other agents have sent to the community.
- Accept or decline proposals.

Tip

Depending on WFM Web's setup at your site, community proposals can be offered to all agents on your team or to all agents on all teams.

To find out how to navigate the **Proposals** view and see descriptions of its controls and columns, see Viewing proposals.

About the Proposals table

The table shows all proposals whose first day falls within the selected month, and whose status is Open (they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled). The table is sorted by the first date of each proposal.

The proposing agent's name is in the first row of the proposal:

- Click the link in the agent's name in either row if you want to display his/her proposal details.
- Click the link in your name in either row if you want to display your schedule details.
See Proposals view: Proposal and schedule details.

To learn how to expand the table to see additional rows, see Finding details in the grid.



Accepting or declining a proposal

The screenshot shows the 'Proposals' view with a table of proposals. The table has columns: Re, Agent, Date, Paid hours, and Comments/schedule. The date range is December 2016. The table lists four proposals, with the third one (a0001 a0001, 12/16/16-12/16/16, 06:00) highlighted. A hand-drawn arrow points to the 'Accept or Decline' button in the third row, with the text 'Click Accept or Decline.' written next to it.

Below the table, there are two modal windows. The left window is titled 'Comments:' and contains the text: 'You are about to accept the trade proposal. From agent: a0001 a0001. For. 12/16/16 - 12/16/16. Enter comments'. The right window is also titled 'Comments:' and contains the text: 'You are about to decline the trade proposal. From agent: a0004 a0004. For. 12/16/16 - 12/16/16. Enter comments'. Both windows have a 'Cancel' button and an 'OK' button. A hand-drawn arrow points from the 'OK' button in the right window to the text 'Enter comments and click OK.'.

Below the modal windows, there is a smaller table showing the updated state. The first row (a0001 a0001, 12/16/16-12/16/16, 06:00) is now marked with a checkmark in the 'Re' column. The second row (a0001 a0001, 12/17/16-12/17/16, 04:00) is marked with a checkmark in the 'Re' column. The third row (a0008 a0008, 12/17/16-12/17/16, 04:00) is marked with a checkmark in the 'Re' column. A hand-drawn arrow points from the 'OK' button in the left modal window to the checkmark in the first row of the updated table, with the text 'Indicates an accepted proposal.' written below it. Another hand-drawn arrow points from the 'OK' button in the right modal window to the text 'Declined proposals are removed from the list.'

To accept or decline a proposal in the Proposals view:

1. Click **Accept**  or **Decline**  in **Actions** column for the proposal you want to accept/decline. **The Comments dialog box opens.**
2. Enter comments, if you wish, and then click **OK**.

A check mark  appears in the Re column for this proposal, indicating that you've accepted, or the proposal is removed from the list of proposals, because you've declined.

Watch: Accepting a personal or community trade proposal

The following videos show how to review and accept incoming personal and community trade proposals.

Receive a personal trade proposal

[Link to video](#)

Accept a community trade proposal

[Link to video](#)

Reviewing responses to proposals

Use the **My Trades** view to:

- Review trade proposals that you have sent to the community or an individual, along with their status and any responses.
- Review your responses to other agents' schedule trade proposals or community proposals.
- Review the status of proposals to which you have responded.
- Cancel a pending response, if you change your mind.
- Cancel your own pending trade proposal, if you change your mind.

The window includes standard date selectors and a table of proposals and responses, whose general controls are described in Viewing my trades.

About the Trades table

The table shows all of your trades and responses to proposals whose first date is within the selected month. It is sorted by the first date of each trade.

For each trade, the **Agent name** column shows the agent who posted each original proposal:

- Click the link in the agent's name in either row if you want to display his/her proposal or request details.

- Click the link in your name in either row if you want to display your proposal or request details.

See My trades view: Proposal and request details.

Canceling a pending response

My Trades


Re	Status	Agent	Date	Paid hours	Comments/schedule
	Expired	a0001 a0001	12/3/16-12/3/16 >	04:00	From a0001 to a0002
	Open	a0003 a0003	12/7/16-12/7/16 >	08:00	Community from a0003
	Open	a0001 a0001	12/10/16-12/10/16 >	04:00	Do you want to trade?
	Open	a0009 a0009	12/11/16-12/11/16 >	08:00	
	Accepted	a0001 a0001	12/11/16-12/11/16 >	08:00	I'll take it.
	Open	a0001 a0001	12/16/16-12/16/16 >	06:00	Community from a0001
	Confirmed	a0001 a0001	12/17/16-12/17/16 >	04:00	Individual from a0001 to a0008

Comments:

You are about to cancel the trade.
 From agent: a0001 a0001
 For: 12/11/16 - 12/11/16
 Enter comments
 I've changed my mind, sorry.



Cancel OK

To cancel a pending response in the My Trades view:

1. Click **Cancel**  in **Actions** column for the trade response you want to cancel. The Comments dialog box opens.

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2. Enter comments, if you wish, and then click **OK**.

The **Status** column in the **My Trades** view shows the current status of each trade proposal or response. Each proposal and response status determines the actions that you can take in the **Actions** column:

Status	What it means	Actions you can take
Open	The proposal has been offered to a specific agent or to the community, and has not yet passed into one of the other statuses listed in this table.	Click Cancel  if you want to cancel an open proposal.
Accepted	You have accepted this personal proposal or responded to this community proposal. Your response is now awaiting the proposing agent's decision.	Click Cancel  if you want to cancel your response.
	Another agent has accepted your personal proposal or responded to your community proposal.	Click Accept  on a response row to submit this trade (with this response) for approval. Click Decline  if you choose not to trade with this respondent.
In Review	You accepted this proposal and, if required, the proposing agent approved your response. But the trade could not be auto-approved. It is awaiting a supervisor's approval.	Click Cancel  if you want to cancel your response.
	Another agent has accepted your proposal and, if required, you have approved the response. But the trade could not be auto-approved. It is now awaiting a supervisor's approval.	Click Cancel  if you want to cancel your original proposal. This will also cancel the response.

See also, [More trade statuses](#). For further details about requirements for a trade's approval, see the [Trading overview](#).

More trade statuses

The statuses described in this table do not require any action on your part, but you will see them when you are reviewing proposals and trades.

- **Confirmed**—Both you and the other agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.
- **Declined**—The proposal/response was declined by either the proposing agent/responding agent (in the case of a personal proposal), by a supervisor, or by WFM. The trade will not take place.
- **Cancelled**—Either you explicitly cancelled your proposal/response, the other agent cancelled the original proposal, or WFM automatically cancelled the pending trade (because of changes to your

schedule or the responding agent's schedule). The trade will not take place.

- **Expired**—The proposal did not receive approval by the day before its first included day. The trade will not take place.