

GENESYS

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Workforce Management Agent Help

Managing single-site trade proposals

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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



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.

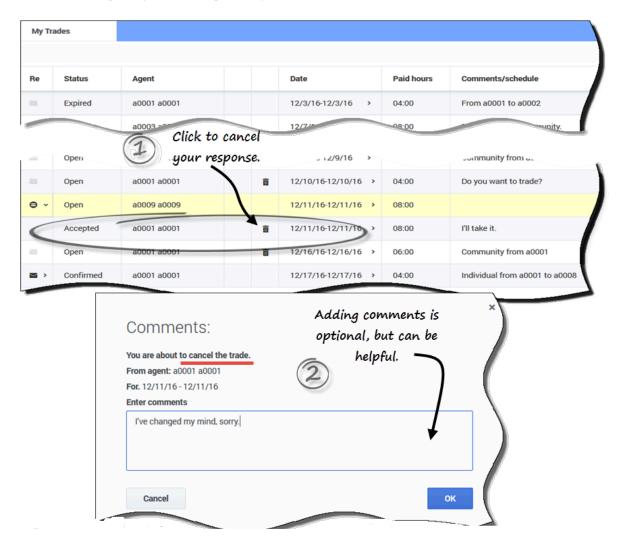
For each trade, the **Agent name** column shows the agent who posted each original proposal:

• 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



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.

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 autoapproved. 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.