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Workforce Management Agent Help

Trading

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- Agent

Read about the shift trading process and the requirements for a successful trade.

Related documentation:

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This topic first describes the entire trading process and then breaks it down into the steps required for a successful trade.

Administrators and supervisors determine the trading rules and what schedule trades are permitted in your contact center. If single-site trading is permitted, see Single-site trading for details about the views and settings you can use to create and send schedule trade proposals. If multi-site trading is permitted, see Multi-site trading.

How trading works

A trade can include up to six full weeks of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either automatic (by WFM) or explicit (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team, site, or business unit (if multi-site trading is permitted).

If a trade is approved, it executes: both agents' schedules change to reflect it, and the trade no longer appears in the trading views. However, all of your own proposals still appear on the My Trades view even after WFM executes the corresponding trades.

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other agent's scheduled activities), WFM automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur.

Requirements for a successful trade

For a trade to take place, all the following steps must occur.

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response from a community or personal proposal. (This step is only required for personal proposals if the proposing agent specified manual approval.)
- The trade receives either WFM's automatic approval or a supervisor's explicit approval.

Single-site trading

If single-site trading is permitted in your contact center, you can select one of two views in the Trading module's drop-down menu; Proposals or My Trades. You can use these views to obtain more convenient schedules by trading with other agents.

Using the Trading views, 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' schedules or schedule details.

Tip

You create schedule trade proposals in the My Schedule or My Schedule Details view.