GENESYS™

Workforce Management Agent Help

Viewing proposal and trade details

6/9/2026

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View your proposal and trade details, and other agent's details.

Related documentation:

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In addition to being able to expand the grid in the **Proposals** and **My Trades** views to see schedules, you can view the details of other agents proposals and trades as well as your own. Clicking an agents' name or your own will open the details in a separate window.

What's in the details?

Proposal, Request, and Schedule details (yours or other agents') open in separate windows, but they have similar characteristics, including: the agent's name, the

date of the trade proposal, and a break down of all scheduled items, such as the start/end times, paid hours, type, and item name, as well as comments, scheduled activities, meals, breaks, and total paid hours.

Proposals view: Proposal and schedule details

You'll see different presentations of the schedule details in this view, depending on the proposal type and which agents' name you click.

Proposal details opens when:

- You clink the link in an agent's name:
    - If it is an individual proposal that you have not answered, you can decline, close, or respond to the proposal.
    - If it is a community proposal that you have not answered, you can close or respond to the proposal.
    - If it is a proposal that you have answered, you can only close the proposal details.

My schedule opens when:

- You click the link in your name:
    - You can only close the schedule details.

My trades view: Proposal and request details

You will see different presentations of the schedule details in this view, depending on which agents' name you click and the trade status.

Proposal details opens when:

1. An agent initiates a proposal and you clink the link in his/her name:
    - You can only close the proposal details.
2. You initiated a proposal and you clink the link in your name:
    - If the status is **Open** or **In Review**, you can delete the proposal or close the proposal details.
    - If the status is **Canceled**, **Declined**, or **Expired**, you can only close the proposal details.

Request details opens when:

1. An agent responds to your proposal and you click the link in his/her name:
    - If the status is **Accepted**, you can decline, close the request details, or respond to the proposal.
    - If the status is **In Review**, you can only close the request details.
2. You respond to a proposal initiated by an agent and you click your name:

- If the status is **Accepted** or **In Review**, you can delete your response or close the request details.
- If the status is **Canceled**, you can only close the request details.

Other agents' proposal details

Click the link in the proposing agent's name to open **Proposal details**. Examining other agents' schedule details can help you identify agents with whom you want to trade schedules.

> ## Tip
> Your supervisor determines whether you can view proposals within your own team only or across all teams at your site.

Your proposal and schedule details

My schedule

Your schedule opened in the Proposals view.

Agent: a0001 a0001
Schedule details

Time	Paid	Type	Item Name
Saturday, December 10, 2016			
Shift: Shift01, 08:15 AM — 01:30 PM; Activities: A01; Paid Hours: 04:00			
08:15 AM — 01:30 PM	04:00	Shift	Shift01 (A01)
08:15 AM — 08:30 AM	00:15	Work	A01
08:30 AM — 09:00 AM	00:00	Break	Break01
09:00 AM — 09:45 AM	00:00	Meal	Meal01
09:45 AM — 01:30 PM	03:45	Work	A01

Scheduled items are broken down in time intervals per item.

[Close]

You cannot delete your schedule, only close the window.

Proposal details

Your schedule opened in the My Trades view.

Agent: a0001 a0001
Proposal schedule

Time	Paid	Type	Item Name
Saturday, December 10, 2016			
Shift: Shift01, 08:15 AM — 01:30 PM; Activities: A01; Paid Hours: 04:00			
08:15 AM — 01:30 PM	04:00	Shift	Shift01 (A01)
08:15 AM — 08:30 AM	00:15	Work	A01
08:30 AM — 09:00 AM	00:00	Break	Break01
09:00 AM — 09:45 AM	00:00	Meal	Meal01
09:45 AM — 01:30 PM	03:45	Work	A01

Scheduled items are broken down in time intervals per item.

Comments

You can delete your own proposals.

[Delete]   [Close]

Click your name in the **Proposals** view to open **My schedule details**. If you are reviewing your trades in the **My Trades** view, in the proposal you made, click your name to open **Proposal** details.

Examining the details of your own schedule enables you to compare shifts and make a decision about whether or not to accept a proposal.

In the **Proposal details** window, there's an option to delete your proposal, but you cannot delete proposals offered by others.