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Genesys Engage cloud Workforce Management 8.5.1 Guide

How Trading Works

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Important

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A trade can include up to one full week 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 Web) 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 or site.

If a trade is approved, it is executed and both agents' schedules change to reflect it. The trade no longer appears in most trading windows within WFM Web for Agents. (However, agents still see their own proposals in the WFM Web for Agents **My Proposals** window, even after the corresponding trades are executed.)

Not all trades are approved:

- Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web automatically declines a trade.
- If either agent's schedule is changed before a pending trade's approval, the trade is automatically canceled.
- A supervisor may explicitly decline a 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 of the following steps must occur. (See *Workforce Management Web for Agents Help* for details about how agents perform the first three steps.)

- 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 to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)
- The trade receives either WFM Web's automatic approval or a supervisor's explicit approval.

Tip

At all steps before approval, a pending trade can fail in one of three ways: either agent can cancel it; the trade can automatically be canceled if either agent's schedule is changed; or the trade can expire.

How Trades are Tested for Automatic Approval

Once both agents have accepted a trade proposal, WFM Web tests it for automatic approval. These tests evaluate the trade using the conditions listed in each of the following sections:

Exceptions' Trade Conditions

If either agent has a scheduled exception on any of the days to be traded, WFM Web tests the trade against the trade rules configured for that exception type. For example, exceptions that count as vacation time always have either the **Delete** or the **Keep with agent** rule.

Here is how WFM Web acts on each trade rule:

| Exception Trade Rule: | How WFM Web Responds: |
|---------------------------|--|
| Delete | Allows the trade to proceed to the next test, but deletes the exception from the schedule. |
| Do not trade | Agent is not allowed to create trading proposal on day with scheduled exception "Do not trade". |
| Keep with agent | Allows the trade to proceed to the next test, but keeps the scheduled exception with the original agent. |
| Keep with schedule | Allows the trade to proceed to the next test, and trades the exception along with the schedule. |

Auto-Delay Conditions

WFM Web automatically declines a trade if any of the following conditions is true for any day included in the trade:

- Either agent's schedule overlaps with the overnight schedule from the previous day for a recipient

agent.

- A trading proposal includes a day with the "do not trade" exception.

Supervisor Approval Conditions

WFM Web places a trade "in review"—a status that requires a supervisor to approve the trade—if the trade involves any of the following conditions:

- The traded schedules have different work durations.
- Either agent is trading days off for working days.
- Either agent has a scheduled exception with the **delete** rule enabled.
- Either agent is trading a **keep with agent** exception for fixed-staff work.
- The trade violates an agent's availability (contract availability, granted availability preferences, or rotating availability).
- The trade violates certain contract terms or site rules: minimum or maximum working hours per day or per week; minimum or maximum days off per week; or minimum time off between consecutive working days.

Auto-Approval Conditions

If a schedule trade does not match any of the **Auto-Delay** or **Supervisor Approval** conditions, WFM Web automatically approves it and trades the schedules.

Auto-Cancel Conditions

WFM Web automatically cancels a trade proposal, a response, or a **pending trade in review** if either agent's schedule is modified in the Master Schedule. Examples of auto-cancel conditions are:

- A supervisor explicitly modifies either agent's schedule.
- Another trade is approved and executed for either agent that involves a schedule period that overlaps with the schedule period for this trade.

Expiration Conditions

If a trade has not received approval by the day before its first included day, it expires, and can no longer be approved by any agent or supervisor.