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Workforce Management Web for Agents Help (Classic)

Trading Windows Road Map

Trading Windows Road Map

The eight Trading windows enable you to propose schedule trades, accept or decline other agents' trading proposals, and cancel your proposals or responses. See the sections below for how to:

- [Open the trading windows](#)
- [Move between trading windows](#)
- [Use the trading windows' common features.](#)

Opening the Trading Windows

To open the trading windows from other windows, click Trading on the Menu Bar.

- If you have unanswered personal trade proposals for the currently selected week, the Personal Proposals window opens.
- If you have no unanswered personal trade proposals for the currently selected week, the My Proposals window opens.

Moving Between Trading Windows

Most trading windows include the Trading menu bar. Click tabs on the bar to move among the trading windows.





Each trading window shows a particular kind of information about trade proposals, responses, or underlying schedules. The eight trading windows are:

Trading window	Description
Personal Proposals	Shows trading proposals that another agent has proposed to you specifically.
Community Proposals	Shows trading proposals that agents have offered to all agents within your team or site.
My Proposals	Shows schedule trades that you have proposed, with their status and any responses. (Responses appear below their associated proposal.)
My Responses	Shows your responses to other agents' trading proposals, with status information.
[Trading] Schedules	If enabled, helps you identify trading partners by showing other agents' scheduled working hours. (If your system administrator has disabled this feature, the Trading menu bar does not include a Schedules tab, and you cannot open this window.)

Trading window	Description
	Agent days displayed with a darker background color are days that are not compatible with you, as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.
Schedule Details Pop-Up	Clicking an agent name shows that agent's detailed schedule (activities and start/end times).
Create Trade Proposals	Allows you to initiate a trading proposal. Click create trade proposals in the Schedule Window to open this window.
Trading Comments	If your system administrator has enabled WFM for Agents to support comments, allows you to add explanatory comments to trade proposals and responses. Click the action buttons in the Personal Proposals , Community Proposals , My Proposals , or My Responses windows to open this window.

Trading Windows' Common Features

Most of the trading windows display information for one week at a time, with standard **date selectors** to move to other weeks. Most windows show up to 10 trades at a time in a table that includes some, or all, of the following columns and controls:

Column/Controls	Description
Re	In the Personal Proposals or Community Proposals window, an asterisk (*) in this column indicates that you have already responded to this trading proposal.
Dates	Shows the start and end dates involved in the trading proposal or response.
Status	In the My Proposals or My Responses window, this column shows the acceptance or approval status of the trading proposal or response.
Agent name	Shows the agent originating or responding to the trading proposal. Click any link in this column to view the corresponding agent's Schedule Details pop-up.
<i>days of the week</i>	These columns show work start/end times for each day in the proposed trade.
Total paid	Shows the total number of paid hours covered by the proposed trade.
Action buttons	Provides buttons to  accept,  decline, or  cancel a proposal or response, or to  respond to a community proposal.

Column/Controls	Description
Comment	Shows any comments attached to the proposal or response. If the trade needs to be approved by a supervisor, the supervisor can see any comments you enter when you make the trade request. Or the supervisor may enter a comment about the trade for you to read. This column does not appear if your system administrator has disabled the Comments feature.
Previous 10	Click this button to display the previous set of trades (if there are more than 10 trades).
Next 10	Click this button to display the next set of trades (if there are more than 10 trades).