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Workforce Management Agent Help

Managing multi-site trade proposals

Contents

- 1 Managing multi-site trade proposals
 - 1.1 Managing trade proposals sent by you
 - 1.2 Managing trade proposals offered to you
 - 1.3 Managing trade proposals sent to the community
 - 1.4 Viewing proposal details
 - 1.5 Responding to trade proposals

Managing multi-site trade proposals

WFM enables you to filter trade proposals in the **Trades** view by **My Trades**, **Offered to me**, or **Community** proposals. WFM displays all proposals whose date range falls within the selected month. By default, it shows the current month, but you can change it by selecting a different month in the **calendar**.

This topic describes how to use the filter to change how proposals are displayed so you can complete various tasks and find detailed information about trading agents, proposals, and schedules quickly and easily.

Managing trade proposals sent by you

Click the filter drop-down menu and select **My Trades**.

Trades

My Trades

My business unit

No Actions display if declined by both parties.

Proposer	Responder	Status		Date	Trading date	Paid hours	Comments/schedule
AgentF01 AgentL01	AgentF11 AgentL11	Open		8/2/17-8/3/17	8/2/17-8/3/17	16:00	
AgentF01 AgentL01	AgentF05 AgentL05	Open / Accepted		8/2/17-8/2/17	8/2/17-8/2/17	08:00 / 24:00	Thanks! Let's trade.
AgentF10 AgentL10	AgentF01 AgentL01	Declined / Declined		8/2/17-8/2/17	8/2/17-8/2/17	24:00 / 08:00	This is from a10 Age
AgentF01 AgentL01		Open		8/4/17-8/4/17	8/4/17-8/4/17	08:00	from a01

Second filter is disabled when "My Trades" is selected.

WFM displays the trade proposals that you created, and proposals from other agents that you answered (offered only to you and offered to the community).

You can view your proposals and their details, accept or decline other agents' trade proposals, and cancel your proposals or responses.

The **Status** column in this view shows the state of each trade for each participant—the **Proposer** and the **Responder**—in this format: **Open / Accepted**.

Click the anywhere in a selected row to open the **Proposal Details**.

Managing trade proposals offered to you

Click the filter drop-down menu and select **Offered to me**.

The Status shows the state of the proposal for both Proposer and Reponder.

Proposer	Responder	Status	Date	Trading date	Paid hours	Comments/schedule
AgentF01 AgentL01	AgentF05 AgentL05	Open / Accepted	8/2/17-8/2/17	8/2/17-8/2/17	08:00 / 24:00	Thanks! Let's trade.

Second filter is disabled when "Offered to me" is selected.

WFM displays the trade proposal that were offered to you and personal trade proposals created by you that require your confirmation.

You can view these proposals and their details, accept, or decline them.

After you accept or decline a proposal, this trade is removed from the **Offered to me** proposals, but remains in the **My Trades** list of proposals.

Tip

You can distinguish between community and individual proposals by the action icons available to you. Community proposals only have the **Accept** icon, whereas individual proposals have both **Accept** and **Decline**.

Managing trade proposals sent to the community

Click the filter drop-down menu and select **Community**.

Proposer	Responder	Status	Date	Trading date	Paid hours	Comments/schedule
AgentF12 AgentL12		Open	8/4/17-8/4/17	8/4/17-8/4/17	08:00	from a12

WFM displays only the trade proposal that were sent by other agents to the community.

You can view these proposals and their details, and accept them.

After you accept a proposal, this trade is removed from the **Community** proposals, but remains in the **My Trades** list of proposals.

Viewing proposal details

You might want to view the details for schedule trade proposal before taking any action. To do so, click anywhere in the row containing the proposal.

Proposal details

Wednesday, August 2, 2017

Proposer: AgentF01 AgentL01
Shift: flexible shift, 02:00 AM – 10:00 AM; Activities: Trade MSA_(1496742949979)_Site1; Paid Hours: 08:00
02:00 AM – 10:00 AM 08:00
02:00 AM – 10:00 AM 08:00

Responder: AgentF05 AgentL05
Shift: 12:00 AM – +12:00 AM; Activities: Activity3; Paid Hours: 24:00
12:00 AM – +12:00 AM 24:00
12:00 AM – +12:00 AM 24:00
12:00 AM – +12:00 AM 00:00

Comments: *Optionally, enter comments.*

Click "Close" if you only want to view the details.

Buttons match the icons in the Actions column.

Close Help Delete

The **Proposal Details** dialog opens, containing the following information:

- The date of the proposed trade
- The name of the proposing agent
- The name of the responding agent (if an agent has responded)

- The schedule details, including: shift, activities, paid hours, marked time, and duration
- A **Comments** field
- **Action**, **Close**, and **Help** buttons

Responding to trade proposals

A screenshot of a table showing trade proposals. The table has columns for Agent, Status, Date, and Trading date. The first three rows are highlighted in light blue. The first row shows 'AgentL11' with 'Open' status. The second row shows 'AgentL05' with 'Open / Accepted' status. The third row shows 'AgentL01' with 'Declined / Declined' status. A fourth row shows 'Open' status. A black circle highlights the action icons (trash, checkmark, and X) in the first three rows. A blue arrow points from the text 'Actions icons' to the circle. Below the table, a legend box explains the icons: 'For example: [trash icon] = Delete, [checkmark icon] = Accept, [X icon] = Decline'.

	Status		Date	Trading date
AgentL11	Open	[trash icon]	8/2/17-8/3/17	8/2/17-8/3/17
AgentL05	Open / Accepted	[checkmark icon] [X icon]	8/2/17-8/2/17	8/2/17-8/2/17
AgentL01	Declined / Declined	[trash icon]	8/2/17-8/2/17	8/2/17-8/2/17
	Open	[trash icon]	8/4/17-8/4/17	8/4/17-8/4/17

Actions icons

For example: [trash icon] = Delete, [checkmark icon] = Accept, [X icon] = Decline

Three overlapping 'Comments' dialog boxes are shown. The top box is titled 'Comments:' and contains the text 'You are about to cancel the trade.', 'From agent: AgentF01 AgentL01', and 'For. 8/4/17 - 8/4/17'. It has an 'Enter comments' text box and a 'Cancel' button. The middle box is titled 'Comments:' and contains the text 'You are about to decline the trade proposal.', 'From agent: AgentF05 AgentL05', and 'For. 8/2/17 - 8/2/17'. It has an 'Enter comments' text box, a 'Cancel' button, and a 'Help' button. The bottom box is titled 'Comments:' and contains the text 'You are about to accept the trade proposal.', 'From agent: AgentF05 AgentL05', and 'For. 8/2/17 - 8/2/17'. It has an 'Enter comments' text box, a 'Cancel' button, a 'Help' button, and an 'OK' button. A blue arrow points from the text 'Click to accept the proposal.' to the 'OK' button.

Comments:

You are about to cancel the trade.

From agent: AgentF01 AgentL01

For. 8/4/17 - 8/4/17

Enter comments

Cancel

Comments:

You are about to decline the trade proposal.

From agent: AgentF05 AgentL05

For. 8/2/17 - 8/2/17

Enter comments

Cancel

Help

Comments:

You are about to accept the trade proposal.

From agent: AgentF05 AgentL05

For. 8/2/17 - 8/2/17

Enter comments

Cancel

Help

OK

Click to accept the proposal.

You can respond to trade proposals in one of two ways:

1. In any of the three filtered **Trades** views, click the **Action** icon in the table that matches your choice. **The Comments dialog opens, enabling you to add comments and respond.**
2. When the **Proposal Details** dialog is open, click the **Action** button in the bottom-right corner. (See [Viewing proposal details](#))