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Workforce Management Web for Supervisors Help

Rules for Sending Notifications

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Rules for Sending Notifications

This topic describes the rules that govern when and to whom WFM sends emails for each notification type. After saving notifications, WFM uses the specified **Subject**, **Body**, and rules listed below when sending them to agents and supervisors.

Schedule Modifications

When a supervisor changes one or more scheduled days, WFM sends a schedule modification notification to the affected agent in the configured site and to supervisors who have the appropriate security rights.

Schedule Trade Status Changes

WFM applies the following rules when sending notifications of trade status changes. The proposing agent is one creating the trade request; the responding agent is the one receiving the proposal:

- Both the proposing and responding agents associated with the selected sites get notified when a trade status is **User-declined**, **User-approved**, **Auto-declined**, **Auto-approved**, or **Cancelled**.
- Supervisors who have appropriate security rights are notified when a trade status is **Pending**, or changes from **Pending** to any other status.
- The responding agent is notified when the status of a trade proposal is **In Review** or **Open**.
- The proposing agent is notified when the response status of a trade proposal is **Accepted**, **In Review**, or **Cancelled**.

Double-Handshake Trade Proposals

A double-handshake trade proposal works as follows: When Agent A creates a trade proposal for Agent B (or for the community), there is a check box that asks whether or not the agent wants to manually approve the response: Check if you want to manually approve response to this trade proposal.

If this box is not checked, the order of events is:

1. Agent A creates proposal.
2. Agent B accepts proposal.
3. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

If the box is checked, a double-handshake proposal is created. The order of events is then:

1. Agent A creates proposal.
2. Agent B accepts proposal.
3. Agent A needs to approve the response from Agent B.
4. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

The extra approval step (3) allows Agent A to re-confirm that he wants the trade to go through.

Time-Off Bidding

WFM applies the following rules when sending notifications of time-off bidding changes:

- When an agent's status in bidding period is changed to **Waiting** or **Timed Out**, WFM sends a time-off bidding notification to the affected agent.

Time-Off Request Status Changes

WFM applies the following rules when sending notifications of time-off request status changes:

- When supervisors manually change agents' time off in the **Calendar** module, affected agents and other supervisors who have the appropriate security rights receive a notification.
- When agents request time off that are not **Auto-declined**, supervisors who have the appropriate security rights are notified.
- When automatic **Time-Off** request status changes occur, the affected agents and supervisors who have the appropriate security rights and are notified.
- When time-off balances change, supervisors who have the appropriate security rights are notified.

For a complete description of the WFM security roles and privileges, see [Roles](#) in this Help.