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Workforce Management Web for Supervisors Help

Trading

5/4/2025

Trading

Use the Trading module to review, and accept or decline, agents' proposed schedule trades. The features of this module are:

- A [List of Trades](#).
- Ability to add [Trading Comments](#).
- A [Schedule Details](#) window.

Important

If you do not see Trading information, or cannot configure objects or change settings in Web for Supervisors, you might not have the appropriate role privileges. See [Trading Role Privileges](#) in this Help. Also, you must configure WFM Web to initiate trading for agents. See the [Workforce Management Configuration Options Reference](#).

Using the List of Trades View

The [List of Trades](#) view displays a week's schedule trading information for a single site at a time. Controls enable you to view [details](#) about each trade, to accept or decline the trade, and to enter [comments](#) about your decision.

Trade proposals appear in the List of Trades view if they meet the following criteria:

- The trade has not been automatically approved. Automatic approval is based on WFM's built-in trade rules or on exception types' own configured trade rules.
- The trade has not been automatically cancelled. WFM automatically cancels a proposed trade if either agent's schedule has been modified in some way in the Master Schedule since the trade request was made. For example, a supervisor has explicitly modified the agent schedule; or another trade, with overlapping schedule data, has been approved and executed.
- The trade has not been automatically declined. WFM automatically declines a proposed trade if either agent's schedule overlaps with overnight schedule from the previous day for a recipient agent.
- The trade has not yet been explicitly [approved or declined](#) by any supervisor. (Once acted upon, trades no longer appear.)

If a trade proposal has not been approved or declined by its effective date, the proposal expires and the trade does not occur.