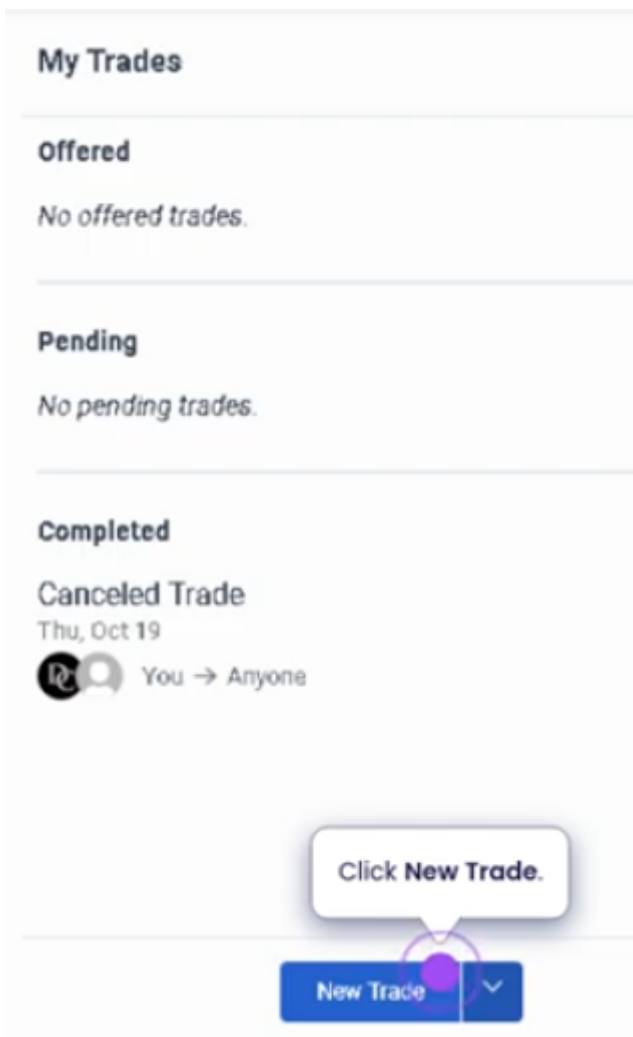
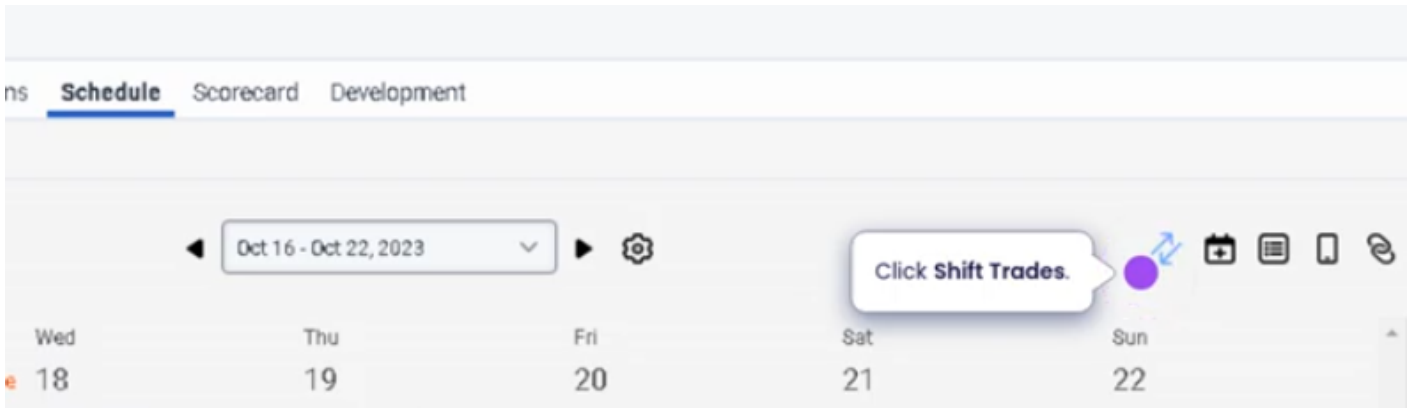


Genesys Cloud - Admin - Request to trade a shift



Thu	Fri	Sat	Su
19	20	21	22
8h 30m Paid	8h 30m Paid	0m Paid	0m
Trade	Trade		

On Qu
8:00 AM
PM

Click **Trade** above the shift in your schedule view or click **Open icon** next to the shift you want to trade.

Trade Shifts

Thu, Oct 19 ×

Under **Trade With**, select **Select User**.

Trade With

Anyone
 Select User

Willing to Accept

Mon
 Tue
 Wed
 Thu
 Fri
 Sat
 Sun
 Mon

Oct 16 Oct 23

Limit Time Range

Shift Start: Shift End:

Expiration date

Sat 21 0m Paid Sun 22 0m Paid

Trade Shifts

Thu, Oct 19
8:00 AM - 5:00 PM · 8h 30m paid

Trade With

Anyone Select User

From the agent list, choose the user with whom you want to trade shifts.

Test User

Oct 16 Oct 23

Limit Time Range

Sat 21 0m Paid Sun 22 0m Paid

Trade Shifts

8:00 AM - 5:00 PM · 8h 30m paid

Trade With

Anyone Select User

Test User

Willing to Accept

Mon Tue Wed Thu Fri Sat Sun Mon

Oct 16 Oct 23

Limit Time Range

Shift Start Shift End

4 : 00 AM 9 : 00 PM

Under **Willing to accept**, select the days you want to work instead.

AM - 12:00

Willing to Accept

Mon Tue Wed Thu Fri Sat

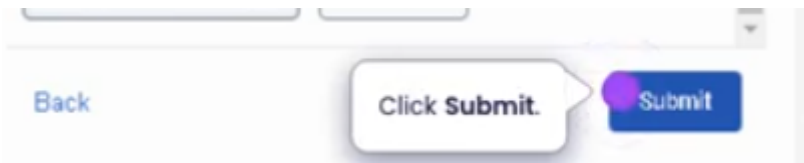
Oct 16

Limit Time Range

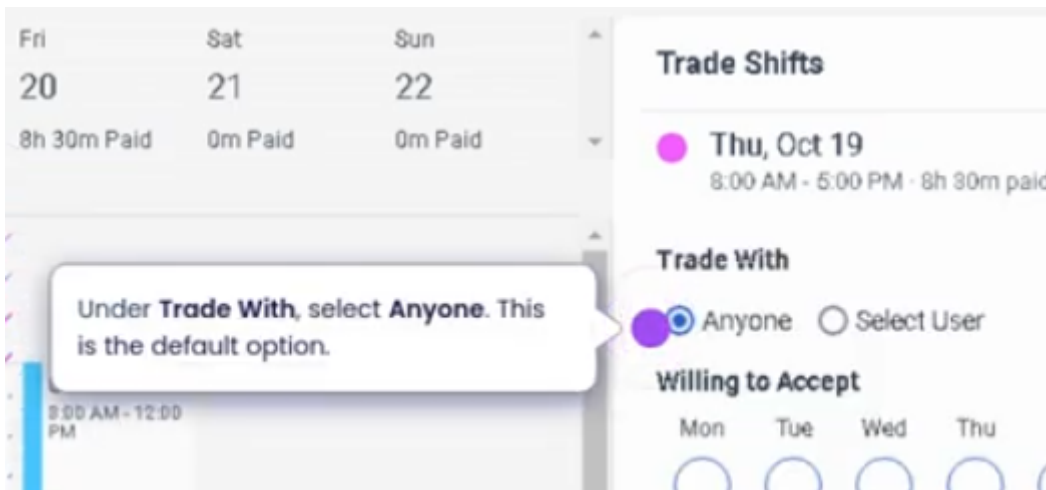
Shift Start Shift End

4 : 00 AM 9 : 00 PM

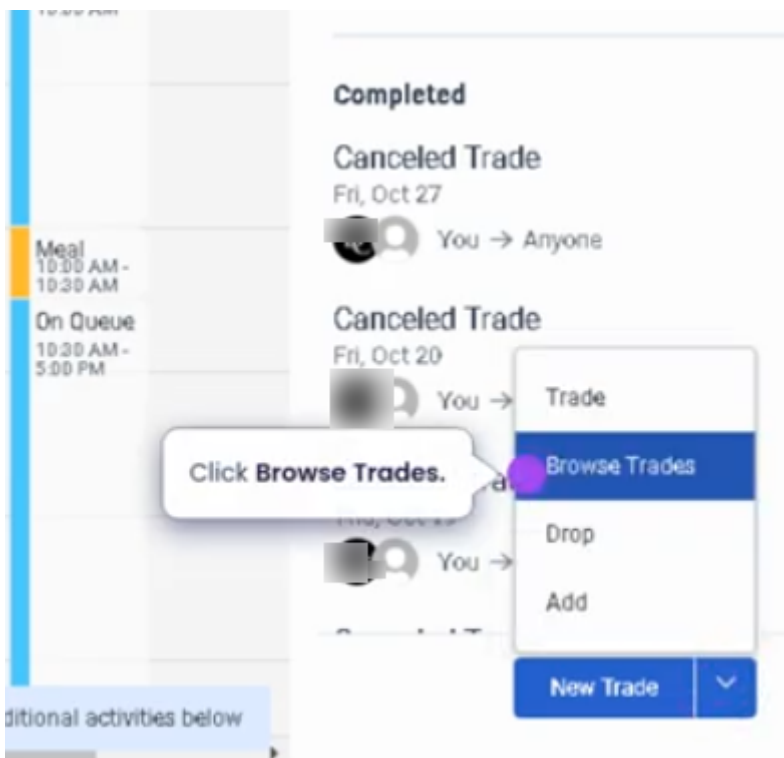
To specify the start and end times for an acceptable trade, check the **Limit time range** box and adjust the shift start and end times for an acceptable trade, use the up and down arrows under **Shift Start** and **Shift End**.



you can also request a trade shift with anyone




Accept shift trade request



Thu	Fri	Sat
26	27	28
0m Paid	8h 30m Paid	0m Paid

Click on the trade you want to pick up.

Trade Shifts

- **Thu, Oct 26**
 8:00 AM - 5:00 PM · 9h 0m paid >
-  Test User → Anyone

Thu	Fri	Sat
26	27	28
0m Paid	8h 30m Paid	0m Paid

On Queue 8:00 AM - 10:00 AM

On Queue 8:00 AM - 10:00 AM


On Queue 10:30 AM - 5:00 PM

On Queue 10:30 AM - 5:00 PM

Select the shift to trade.

Trade Shifts

Receiving

- **Thu, Oct 26**
 8:00 AM - 5:00 PM · 9h 0m paid ×
 Test User → Anyone


Trading

Select the shift you want to trade using your schedule to the left or select a shift below.

- **Mon, Oct 23**
 8:00 AM - 5:00 PM · 8h 30m paid >
- **Wed, Oct 25**
 8:00 AM - 5:00 PM · 8h 30m paid >
- **Fri, Oct 27**
 8:00 AM - 5:00 PM · 8h 30m paid >

Trade Shifts

Receiving

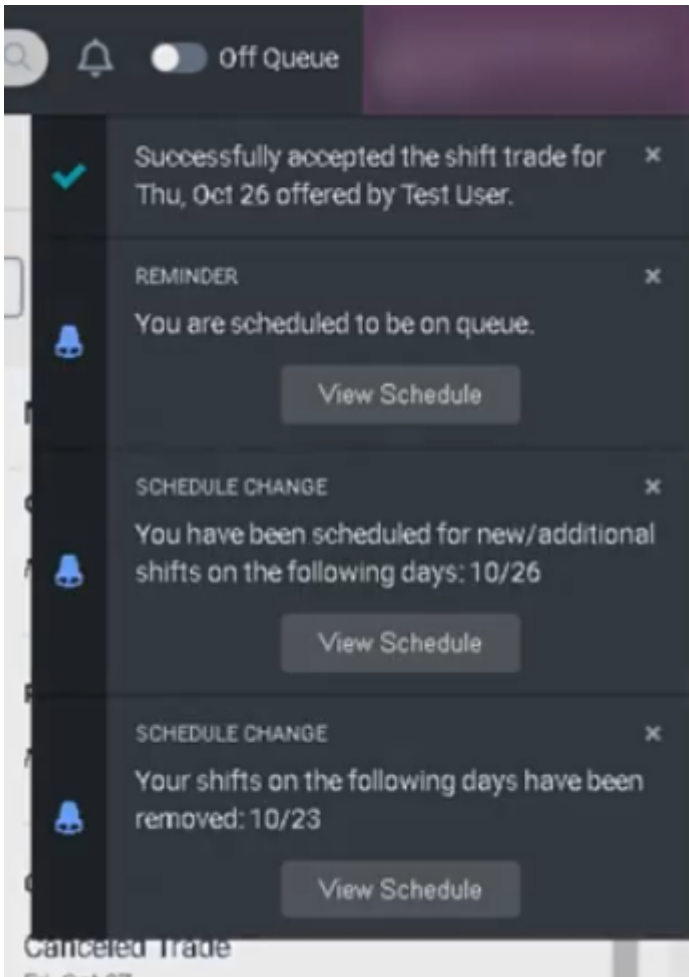
- **Thu, Oct 26**
8:00 AM - 5:00 PM · 9h 0m paid ×
 Test User → Anyone

Trading

- **Mon, Oct 23**
8:00 AM - 5:00 PM · 8h 30m paid ×

Click **Finalize Trade** to trade shifts.

Finalize Trade



Trading a Shift with a Specific Person (Genesys Cloud)

Summary

Trading a shift with a specific person in **Genesys Cloud Workforce Management (WFM)** allows an agent to request a schedule swap with another agent for a particular shift. Instead of posting the shift to a general shift trade board, the request is directed to **one specific agent** who can accept or decline the trade.

This capability helps teams manage schedule changes while maintaining **coverage requirements, staffing rules, and adherence to workforce policies** configured in Workforce Management.

Utilization

Use Case	Description
Personal schedule conflicts	An agent needs coverage for a shift due to appointments or personal obligations
Team collaboration	Agents coordinate directly with colleagues to swap shifts
Last-minute coverage	Allows agents to quickly resolve coverage gaps with trusted teammates
Work-life balance	Provides flexibility while maintaining staffing requirements
Supervisor-approved schedule adjustments	Shift swaps remain governed by WFM validation rules

When a shift trade is requested, Genesys Cloud validates that the swap **meets scheduling constraints**, including staffing requirements and agent eligibility.

Best Practices

Practice	Reason
Confirm availability with the other agent before sending the request	Increases the chance the request is accepted quickly
Verify both agents have the required skills	Ensures the swap passes workforce management validation
Use shift trade early when possible	Gives time for approval and avoids coverage risk
Follow team scheduling policies	Prevents violations of labor rules or staffing plans
Monitor notifications for acceptance or rejection	Allows quick follow-up if the trade is declined
Avoid excessive shift trading	Maintains schedule stability and forecasting accuracy

Example Scenarios

Scenario 1 – Personal Appointment

Agent scheduled for evening shift



Agent has personal appointment



Agent requests shift trade with teammate



Teammate accepts the trade



Genesys Cloud validates and updates schedules

Revision #3

Created 10 March 2026 16:39:18 by Cesar Gzz

Updated 11 March 2026 21:39:46 by Cesar Gzz