

Context based ordering assistant (CBO)

The **context based ordering assistant** allows a user to shop in one or more predefined procurement contexts. Contexts are made available to individual users in the [context definition process](#)

It is part of our [advanced guided buying tools & ordering assistants](#) extension of [ZUGSEIL Shop](#).

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Purpose

Each context bears individually **optimized catalog category hierarchy** and a set of specific products which target explicitly this context. This **speeds up** the shopping process and provides a better shopping experience.

Benefits

- **Increased productivity** - by reducing time for ordering products
- **Reduction of maverick buying** - regular users may only order predefined products, and may not purchase "out-of-scope" products
- **Procurement governance** - For each context specific approval processes may be defined, leading to faster and more controllable purchasing processes.
- **Multi-Tier Purchasing Knowledge-Management** - Each of the purchasing participants can bring its knowledge to the table and through this reduce complexity and changes for wrong purchasing decisions

Examples

These two examples explain the value for context-based ordering

Transportation industry & Personal Protective Equipment

Usecase: The ordering of Personal Protective Equipment (PPE) in a large scaled public transportation company (SBB) is structured by teams, which are dedicated for specific jobs. Each of these jobs require specific equipment. Since some of these equipment are either expensive or need to be certified for the jobs, an approval process by the team managers is essential for specific processes

Solution: Each of these teams receive their own context. Cross-functional teams receive their own contexts. Staff members, which are in multiple teams are member of multiple teams, receiving their contexts. Generally this flow is adhered:

- The strategic buyer for personal protective equipment (PPE) defines **suppliers** and manages their catalogs. Also a "internal ordering" PPE category structure with PPE specific search attributes is defined by the strategic buyers and is mapped to the relevant suppliers catalogs.
- The PPE demand leads ("Teamleiter") define **team type/job profile specific products** by throwing out undesired or not required products or full product categories for the team.
- The demand side ("Mitarbeiter") will only see the products made available from its team leads.

Construction industry

Usecase: Each construction site requires specific material depending on the project type. Project types are in a multi level hierarchy, e.g. "Hochbau" -> "2-Familienhaus 7 Einheiten". This approach allows the definition of typical project phases and allows assignment of typically required products generally and per project phase. To avoid redundant spend and maverick buying, for specific or expensive equipment demand approval flows are required.

Solution: Each of the projects receives its own context. Generally this flow is adhered:

- Automatic project generation - Projects are defined in the ERP and are transmitted via an interface and classified by a project type automatically. For each of these project types a default context is defined from which the basic settings are inherited.
- The strategic buyer at the HQ manages suppliers, categories and products. This typically happens by removing settings not suitable or not desired for this project.
- The demand lead role ("Bauführer/Projektmanager") further narrows down specific materials or categories which are not desired. The team leads can delegate the "see all products" permission to specific demand side team members.
- The demand side role ("Polier") will by default only see the products made available from its team leads

See also

- [App:Contextbased Ordering Manager](#)
- [App:Team manager](#) - To manage CBO properties on team level (upgraded to
- [App:Project Administration](#) - For managing projects and CBO properties on projects
- [App:Facilities Administration](#) - For workplace administration
- [App:Organization units administration](#) - For managing CBO properties on organization units
- [App:Business participant groups administration](#) - To manage CBO properties on BP group level

For Developers

- [Dev:Context definition process](#)
- [Dev:Context based ordering assistant](#)