

ZUGSEIL Service Scheduling (SRS)

Scheduling appointments between suppliers and customers is an important aspect of every customer-supplier relationship. Appointment-making can either happen as part of the sales process or part of the procurement process. As this is a core concept to many business cases, the technical implementation has been made by b-op through the [B-Op Appointment making services](#). Based on these services ZUGSEIL has built his appointment making center and the Appointment-Making Extension to the [ZUGSEIL Shop](#).

General appointment-making

In both scenarios there are up to three network roles involved:

- the **appointment provider role** - the main tasks of this role are **defining the available appointments** and **accepting appointments**. As the acceptance of appointments is automated by checking that capacities are still available, the definition of available appointments is the main task which can be accomplished through the [appointment administration apps](#). The core data to be administered here are:
 - the types of appointments
 - the resources they require
 - when these appointments are bookable
 - who can define these appointments (through which sales channels)
- the **appointment broker role** - which is a contact builder between appointment providers and appointment consumers.
- the **appointment consumer role** - which are booking the appointments either in their identity themselves or on the appointment broker identity.

As part of Shop RE3, we are implementing as required apps to give the **consumer role** (Klesy, ...) the opportunity to book appointments offered by Olten

Service scheduling in the sales process

In this setup, an **appointment provider** is offering a slot of time, not knowing exactly the products which will be sold (if any). So services provider just creates a service offering and hopes that an **appointment consumer** takes the offer and purchases services or products during that appointment.

The service provider has to define available appointment types through the . So defined available appointment slots are then presented through the sales channels like sales websites or [ZUGSEIL Shop](#) inside a customer digital.

Examples for these business cases are:

- Doctoral appointment
- Consultant appointments

You can read up more on the Dev:ZUGSEIL service scheduling on this site. (ZUGSEIL BEST SHOP - In-Sales Service Scheduling Extension)

The customer either:

- already knows the service provider digital, and receives the available appointment slots directly over MT. He creates appointment in his own digital over the [appointment-making app \(customer\)](#)
- or finds the offering over an appointment-making site, which operates the [appointment broker role](#). The customer creates an appointment on the broker's [appointment-making app \(broker\)](#) website, ultimately leading to his digital knowing about the appointment with the service provider.

Service scheduling in the procurement process

In this setup, an **product provider** has been offering products to a customer, already knowing that these products require appointments. Once the **customer** purchases a product, the customer has to make one of multiple appointments.

The procurement process chains are triggered by customers from the [ZUGSEIL Shop](#), but are also required in the maintenance of products which is handled in the [ZUGSEIL Lifecycle Management \(LCM\)](#) service bundle.

Service Provider / Supplier-side

When selling products over the [b-op platform](#) to customers, each supplier has the option to define service products, which can be used in these contexts:

Standalone service product

These are products, which represent a standalone service. Regarding scheduling the service provider may define these options for his service product:

- **Does not require appointment making**
- **appointment making before order can be placed** - the customer must select an appointment before he can place the order. If this option is selected, the service provider has to select an **appointment type** matching the product, and define whether the appointment making is **mandatory** or **optional** for the customer in the shopping environment, e.g. [ZUGSEIL Shop](#) or [ZUGSEIL Lifecycle Management \(LCM\)](#) Use case: Book an appointment with a hairdresser
- **appointment making before fulfillment can start** - the customer must select an appointment before the fulfillment can start (after the order). e.g. the customer has to visit a optician before correction-glasses can be produced. If this option is selected, the service provider has to select an **appointment type** matching the product. The system will send out **appointment requests** to the customer once the order is confirmed. Use case: Purchase a hairdresser as a present for a third party (you purchase and get a gift card, but your friend which got the present, needs an appointment with the hairdresser to get the service)

Bundled service product

A product can be marked a product bundle (formerly set articles). This means that a product does

not exist as one physical product, but also comes along with a set of other (service) products. Product bundles are distributed over the regular b-op catalog server process. A product bundle may contain other products, which may even cascade through product bundles containing other product bundles. Each product bundle may also contain **service products**, with these service specific settings relevant for scheduling:

- **Does not require appointment making**
- **appointment making before order can be placed** - the customer must select an appointment before he can place the order. If this option is selected, the service provider has to select an **appointment type** matching the product, and define whether the appointment making is **mandatory** or **optional** for the customer in the shopping environment, e.g. [ZUGSEIL Shop](#) or [ZUGSEIL Lifecycle Management \(LCM\)](#) Use case: optician appointment when ordering a pair a correction glasses (to allocate the resource at the optician)
- **appointment making before fulfillment can start** - the customer must select an appointment before the fulfillment can start (after the order). e.g. the customer has to visit a optician before correction-glasses can be produced. If this option is selected, the service provider has to select an **appointment type** matching the product. The system will send out **appointment requests** to the customer once the order is confirmed. Use case: Made to measure try-on for a tailor-made suit (before production can be scheduled)
- **appointment making to finish the fulfillment process** - the customer must define an appointment when the fulfillment process is finished. If this option is selected, the service provider has to select an **appointment type** matching the product. The system will send out **appointment requests** to the customer once the order is confirmed and the goods are ready for shipment. Use case: Typically this is made for handover-meetings of products to the customer. E.g. Made-2-Measure Suite try on.

Appointment making requests

When appoints have to be made after the ordering interaction between the service provider and the customer, the appointment-making is triggered by the provider. They either:

- send an email, asking for appointment making on the [appointment-making app \(broker\)](#) embedded in the service provider's webpage or
- send an MT message to the service receiving party, requesting an appointment to be made inside the customer digital's [appointment-making app \(customer\)](#)

Individual screens

- [Appointment booking - Target selection](#)

Outdated screens

- [Dev:Appointment booking over slots](#)

Development articles

- [Acceptance criteria](#)
- [Translations](#)
- [Versions](#)
- [Acceptance tests](#)

Related articles

- [ZUGSEIL Shop](#)
- [ZUGSEIL Lifecycle Management \(LCM\)](#)

Related technical articles

- [Dev:B-Op technical foundation for appointment making](#)
- [Dev:B-Op Appointment making options](#)
- [Dev:ZUGSEIL Appointment-administration apps](#)
- [Dev:ZUGSEIL Appointment-making app \(customer\)](#)
- [Dev:ZUGSEIL Appointment-making app \(broker\)](#)