

## Booking Activities in Oracle Field Service (OFS)

Booking is the process of creating an appointment to do customer work. It involves the customer, the booking agent, and the field technician.

Here are the steps in the process:

1. The customer requests service.
2. The booking agent gathers information about the job, including its work skill requirements.
3. The agent sends a request through the booking system (which may be external to OFS) to obtain data from OFS and check whether there is enough quota, capacity, or both to perform the work.
  - Capacity is a calculated value indicating the total number of hours that can be scheduled for working on customer activities.
  - Quota specifies how you allocate and prioritize hours.
4. OFS returns information about the available quota and capacity to the booking system and displays open time slots to the agent.
5. The agent proposes one or more appointment times to the customer.
6. Once the customer agrees to an appointment time slot, the agent creates an activity in OFS.
7. OFS routes the activity for a particular day and time and assigns it to a technician's route so that they can complete the customer job at the assigned time.

OFS provides several approaches to booking activities. You select and configure an approach based on your business needs and whether you have an OFS Professional or an Enterprise account.

**Direct assignment booking** is helpful in urgent situations, when the work requires specific technician skills, or when work zones are a factor. Direct assignment is most effective when your resource data is up-to-date and accurate. This approach is available with either account type. However, the Enterprise account provides the option of using the OFS UI in addition to using REST API calls to find qualified resources and their availability.

The other approaches to booking require the Enterprise version of Oracle Field Service.

**Quota-based booking** is best when you have nonoverlapping, longer time slots, and shorter activity durations, and it is helpful if you can add extra capacity when needed through overtime or contract labor. Depending on your business requirements, you can overbook or underbook quota to optimize resource utilization. You can also limit certain types of work to specific times of the day, allowing you to prioritize high-value work during peak hours. You can use quota-based booking for some capacity areas while using other booking methods for others, tailoring your approach to your business needs.

**Availability-based booking** is useful when you need to verify adequate capacity, when time slots overlap, activity durations vary, and capacity data is highly accurate, including correctly categorized resources and up-to-date calendars and work skills. You can create different time slots specific to activity types, creating one set for use with quota-based booking and another possibly overlapping set of time slots for availability-based booking. Availability-based booking also lets you offer short appointment windows and even exact-time appointments.

OFS automatically recalculates capacity throughout the day, ensuring highly accurate bookings.

**Availability-based booking with planned capacity** is an approach that uses the capacity that you plan to have instead of the capacity you actually have available. You can choose to plan capacity for all dates or only for a specific number of days. This allows booking even with incomplete capacity data (noncompliant calendars, staff turnover, and schedule variations), supports underbooking and overbooking strategies, and offers you a choice between automatic quota distribution and granular quota definition.