Improving Order Processing

Custom Development to Support Complex Processes

Mobile Beacon provides high-speed, low-cost, mobile internet access to the anchors of communities: the nonprofits, schools, libraries, and healthcare organizations that provide vital services to millions of Americans every day.

Through this broadband service, organizations have an essential tool to fulfill their missions and maximize their philanthropic impact, which allows organizations to access more information, reach more people, and help more in their communities. Learn more at www.mobilebeacon.org.

mobilebeacon.
4G Internet Access. 4 Nonprofits. 4 Less.

Challenges

• The online order form was buggy and often interfered with customer's ability to complete their purchase. This resulted in a long lead time to close incomplete orders and a persistent strain on Customer Service staff to gather additional information needed to process the order.

• Renewing service plans was a manual, time-consuming process, which resulted in monthly billing falling behind.

• A national nonprofit partner that works in large volumes with Mobile Beacon needed real-time data exchange to keep information up-to-date. The manual processes could not keep up with the pace that data changed resulting in reconciliation and customer service challenges.

Project Highlights

Online Order (VisualForce form) features include
• Ability for Mobile Beacon to create custom promotion or discount codes for nonprofit clients to use during the online ordering process.
• Adobe Sign integration for fully web-based signatures / execution of customer agreements.
• Electronic payment processing.
• Automatic account creation: submitted orders automatically create new account, order, device and/or service plan records.
• Custom post-order processes: built in automatic internal controls for Customer Service staff review of orders to ensure eligibility and accuracy.
• Once the order is approved, staff changes the status to Approved.

Online Renewal (VisualForce form) features include
• Display of contact data
• Display of service plans that are up for renewal
• Display of recent cancellations

Web Services integration (custom API for partner management) includes
• Custom Apex classes developed via the REST API and allowing for a 2-way pass of data between Mobile Beacon and its nonprofit partner.
• API calls used for new inventory updates, device ID updates, internet activation status updates for a service plan, updating contact on a device, swapping a device, and more.
• Diagnostic error logging for all custom work

Solutions

- Online Orders: **streamlined order processing, streamlined payment processing, and streamlined repeat orders and clients**. SFDC Solutions: VisualForce, custom Apex, workflow rules and process builder processes.

- Online Renewals: **developed web service calls directly to PayPal with a third party API, intricate logic behind each condition, and diagnostic log errors that create a task with information is needed to troubleshoot issues**. SFDC Solutions: VisualForce, custom Apex, workflow rules and process builder processes.

- API Integrations: Fionta **built and maintains a custom API** that **facilitates real-time data exchange** between Mobile Beacon and its nonprofit partner.

Results

- Mobile Beacon is now able to **process many more online orders and online renewals**, with few manual processes in an automated fashion that incorporates exceptions and "edge cases". This work **significantly increased automation**, and Fionta continues to work with Mobile Beacon to enhance the processes.

- Mobile Beacon's nonprofit clients can **renew services themselves**, reducing the time Mobile Beacon staff needed to spend in this area.

- Mobile Beacon and its nonprofit partner can keep up with customer service requests and monthly billing reconciliations with **minimal manual effort**.

FÍONTA