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Work Samples

Salesforce Org for a Children Foundation

. Configured Salesforce with EDA to help manage applications, students, and sponsors

. Created custom objects and extended EDA data model

. Added record types, validation rules, and workflows

. Used Visualforce to customize page layouts

. Built S-Docs integration to generate documents and collect electronic signatures

. Set up Process Builder and Flow for data updates
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. Built custom reports and dashboards

. Set up security profiles and Sandbox environment

Salesforce Org for a Pet Organization

. Set up Salesforce Org with Non-Profit Success Pack (NPSP) to help organization better track members, pets, and sponsors.

. Facilitated requirements gathering sessions, created custom objects and extended standard objects

. Imported data with DataLoader and set up MailChimp integration

. Added time-based workflows to automatically send reminders. Created Apex triggers and setup Process Builder

. Provided on-going support to include recent migration from Salesforce Classic to Lightning

. Built custom reports and dashboards
. Setup security profiles and permission sets
. Created user documentation and conducted training sessions

Salesforce Partner Community

. Set up Salesforce Partner Community to.help partners easily connect to leads and company data

. Personalized content based on permissions to increase partner engagement

. Added libraries and knowledge base for partner support

. Set up product catalog and added ability to request quotes
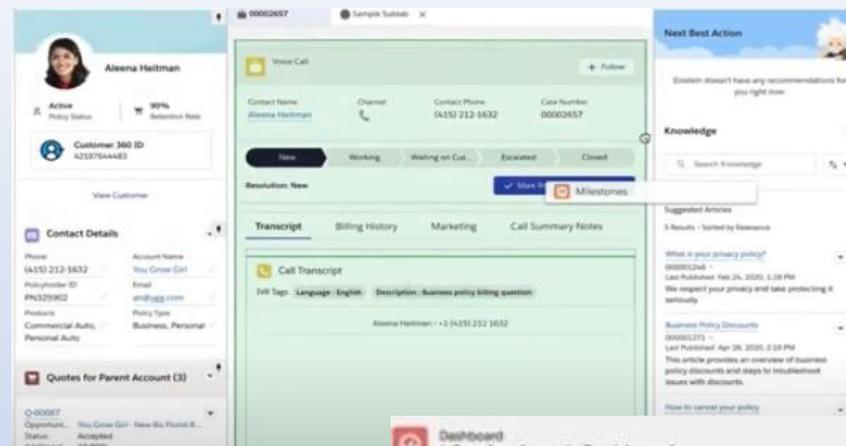
. Added chat features for partner collaboration

Salesforce Org for a Service Company

. Configured Salesforce Service Cloud to automate service processes and provide better customer support

. Set up service workflows to streamline existing processes and accelerate case resolution

. Added Web-to-Case functionality to allow customers to submit cases directly

. Set up ability to issue customer refunds

. Added Queues and escalation rules

. Created custom reports and dashboards