

# Carla Robertson

Certified Salesforce Administrator / Consultant

832-292-1911

[CarlaRob832@icloud.com](mailto:CarlaRob832@icloud.com)

[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
- . Built custom reports and dashboards
- . Set up security profiles and Sandbox environment

The screenshot displays the Salesforce user interface. At the top, a contact record for Mauseleine Joas is shown with fields for Contact Record Type (Student), Gender (Female), Age (9), Current Program (PKF Scholar), and Current Academic Grouping (Tigers). Below this, a detailed view of the contact includes a photo, name, and account information. A 'Sponsorship' section highlights the 'Haiti Foundation' with a crown icon. Further down, an 'Application' record (APP-0007) is visible, detailing the opportunity owner (Catherine Wright), account name (Assemblee De Dieu/Mascary), close date (9/30/2020), amount (\$10,000.00), and opportunity owner. A progress bar indicates the current stage is 'Negotiation/Review'. The bottom section shows application details for APP-0007, including applicant (Mauseleine Joas), application type (Junior High (College)), school attended (Saint Andre de FDB), current GPA (3.60), and grade level (3eme). A 'Generate Documents' button is present, with a dropdown menu showing document options like 'Invoice - Simple', 'Residence Agreement (Basic)', and 'Residence Agreement (Employee)'. To the right, a donut chart titled 'Record Count' shows the distribution of records across four categories: 3 (37.5%), 2 (25%), 1 (12.5%), and 2 (25%), with a total of 8 records.

Category	Count	Percentage
1	1	12.5%
2	2	25%
3	3	37.5%
4	2	25%
<b>Total</b>	<b>8</b>	<b>100%</b>

# 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

The image displays a Salesforce dashboard and a member profile. The dashboard, titled 'Main Dashboard', shows three donut charts: 'Current Members' (330 total, 274 Active, 56 Non-Visiting), 'Active Pets' (268 total, 260 Dog, 8 Cat), and 'Active Facilities' (181 total, 61 Hospitals, 120 Retirement Facilities). Below the dashboard is a member profile for 'Serotte' with tabs for 'Details' and 'Sponsors'. The 'Details' tab shows fields for Last Name, First Name, Household Name, Street Address, City, State, Zip, and Opt Out. The 'Sponsors' tab shows details for 'LocumTenens.com', including Account Name, A.K.A., Billing Address, and a map. At the bottom, a 'Workflow Rule' configuration for 'HT Health Reminder eMails' is shown, with criteria: AND (ISPICKVAL(Status\_c, 'Active'), ISPICKVAL(Health\_Form\_Status\_c, 'Current'), LastModifiedDate + 0.0000578704 >= NOW()).

# 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

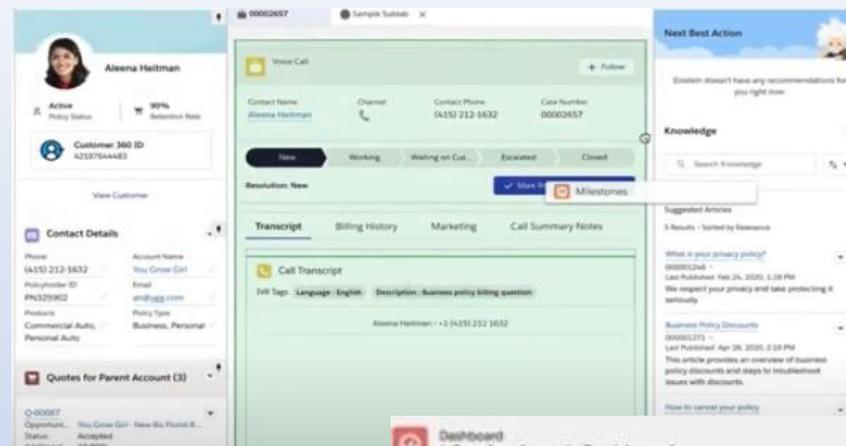
The image displays a collage of screenshots from the Salesforce Partner Community interface. At the top right is the 'Partner Community Dashboard' for user Niall Murphy, dated Sep 10, 2018. It features three main sections: 'My Pipeline' (a funnel chart showing stages like Discovery, Closed W., Proposal, Negotiat., and Qualificat.), 'My Quota Analysis' (a gauge chart showing a total of \$424,481), and 'My Key Opportunities' (a list of opportunities with columns for Opportunity Name and Sum). Below the dashboard is a 'Business Performance' section with a donut chart showing a total of \$737k and a bar chart showing sales by month from June to November. To the right is a 'New Quote' form with fields for Quote Number, Account (Goodman Imports - Add-On Business - 7K), Date (10/2018), and Status (Draft). At the bottom is a 'RELATED' section with two tables: 'Products (2)' and 'Quotes (3)'. The 'Products' table has columns for Product, Product Code, Quantity, and List Price, with rows for 'Maintenance Contract' and 'Battery, High Capacity'. The 'Quotes' table has columns for Quote Number, Net Amount, Status, and Created By, with rows for quotes Q-00059, Q-00060, and Q-00061.

PRODUCT	PRODUCT CODE	QUANTITY	LIST PRICE
Maintenance Contract	M-1000	10.00	\$0.00
Battery, High Capacity	B-1000	2.00	\$2,500.00

QUOTE NUMBER	NET AMOUNT	STATUS	CREATED BY
Q-00059	\$0.00	Draft	Paul Partner
Q-00060	\$33,260.00	Draft	Paul Partner
Q-00061	\$33,260.00	Draft	Paul Partner

# 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



Agent	Status	Time in State	Time Since Login	Time Since Last Accept
Harper Willia...	Available	1m 29s	1m 44s	1m 23s
Daniel Martin	Busy	1m 19s	1m 20s	1m 2s
Sofia Miller	Busy	1m 14s	2m 11s	0m 59s
Emily Allen	Busy	1m 46s	2m 2s	1m 2s