**Janak Patel**

**Salesforce CPQ Architect**

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**Professional Summary:**

* Around 10 years of experience in IT industry and Worked as Lead Solution Architect, Salesforce Architect, Cloud-craze Architect, Ecommerce Architect, SOA Architect and WebSphere Architect in including SFDC Administrator, SFDC Development, Business analysis, System Analysis, Design, Testing, Production Support, Implementation of SFDC and Web based Applications.
* Familiar with Steel Brick CPQ for subscription, billing, invoicing and can take control of sales process from Quote to Cash. Generated Revenue recognition status automatically with Steel Brick CPQ.
* Experienced working with various App exchange products or CPQ products like Salesforce CPQ (formerly Steel Brick CPQ), IBM sterling CPQ, APPTUS.
* Implemented customizations using Apex classes, Visualforce pages, Apex Controllers Custom, Extension List, web service integration using SOAP, REST and salesforce API's, SOQL, SOSL, Aggregate queries and Force.com API.
* Created customized UI as per the client and application requirements using Visualforce.
* Review/Adjust/Write Apex and Visual Force page builds to ensure we keep code coverage at a high percentage as well as meet business needs.
* Developed Lightning Component Framework and also built Lightning component using aura framework.
* Knowledge on Salesforce Lightning Process Builder, Lightning UI/UX, app builder and creating Visual Workflows, salesforce support communities and Chatter groups.
* Experience on developing Data Model in Marketing Cloud for the Data Extensions using Synchronized Data Extensions, Shared Data Extensions, Salesforce Data Extensions and used filters and queries.
* Built reusable UI/UX components with lightning component framework.
* Expertise in creating different email templates and inbound emails using Visualforce for the clients and customers.
* Experience on architectural guidance on data loads, data retention as well as for integrations with Marketing Cloud as well as Sales Cloud and other environments.
* Worked with MVC Model View Controller design pattern and implemented in salesforce customizations using sObjects, Apex controller classes and Visualforce pages.
* Good experience in writing SOQL, SOSL, Aggregate, Relationship queries in apex classes, triggers and batch classes and customized queries to avoid governor limits.
* Strong working experience in developing/customizing applications using Eclipse IDE with Force.com Plug-in and Force.com IDE, written Apex classes, Visualforce pages, Triggers and customized meta-data components like creating custom objects, fields, formula fields and validation rules.
* Having good experience in organization automation processes like workflows, process builder, validation rules and approval process.
* Ability to write complex SOQL, SOSL queries across multiple objects within the SFDC database.
* Worked closely with the product owners, designers, developers during all aspects of creation of SFDC Application.
* Good understanding of the Software Development Lifecycle (SDLC) including Agile and Waterfall methodologies

**Working Experience:**

**Salesforce CPQ Architect Jan, 2019 – Present**

**Paychex, Rochester NY**

**Responsibilities:**

* Worked on Apttus CPQ configuration and integration and responsible creating TDDS, finalizing design & implementation on salesforce security model of access control and data visibility using uses roles, profiles, permissions, public groups, queues, OWD, sharing rules etc.
* Performed Steel brick CPQ related configuration for product setup, approval matrices, approval rules, process builders and flows.
* Developed Apex classes and Triggers and linked them to manage the workflows.
* Experience in configuring price quote (CPQ) with Apptus.
* Worked with business owners to understand their requirements for Salesforce Marketing Cloud application.
* Used Organization security, Network security to ensure user could login only through office servers and Session security to ensure users have access only in their working hours.
* Used more than 55% of Apex for development.
* Coded mobile responsive emails, landing pages and digital ads from scratch, and stay up-to-date with emerging email marketing best practices.
* Assisted in building Journeys in Journey Builder for campaigns that are by the business team.
* Created Wave datasets from using internal Salesforce data and external data sources
* Created CPQ process using Apptus CPQ and CL AppExchange tool in Quote.
* Integrated Apptus CPQ and CLM applications and automating processes on Salesforce platform.
* Implemented Data Loader to load data from Marketing Cloud to Service Cloud.
* Worked on integrating salesforce with core systems like CUDL, origins etc. for processing the loan/deposit applications of Batelco & Worked with peer on informatica cloud - SFDC mapping, task wizards, & data synchronization/replication and administer.
* Designed the Data model to accommodate all the features of existing system and accommodate new features.
* Developed various lightning components that integrate to form a single point of interactive payment calculator to generate a payment plan.
* Developed functionality for Adjustments, Plan Adjustments, and Generation Transactions.
* Handled Migration Effort of moving code from Dev to Prod Org Using Changesets.
* Create and modify contract templates using Apttus X-Author Word.
* Create Document output format, Agreement protection and Agreement Rules for the business affair templates.
* Creating of Merge field, Smart field, Dynamic Segment, clause and playbook in templates.
* Reconcile of Smart field changes.
* Creation of Bundle and Nested Components.
* Configuring the component for Lightning pages and lighting app builder.
* Created apex classes, apex triggers, custom controllers implementing complex code for retrieval from salesforce to visual force pages. developed SOQL statements within controllers, extensions and triggers & Created objects, fields, enabled field level security, enabled record types and page layouts.
* Maintenance of CRM functionality implementing SFDC. Developed SOQL and SOSL queries to get data from different related objects and Used Force.com Explorer for SOQL testing.
* Developed Web Service Callouts from Salesforce to External Applications using SOAP and REST API.
* Used Sales Wave analytics app with salesforce to perform other integrations and customizations.
* Experience in building reusable UI components and pages with Lightning component framework.
* Worked on Salesforce Lightning Components for building customized components replacing the existing ones.
* Also embed Lightning Components in Visual force page by using new Lightning Out feature by event-driven programming.
* Responsible for setting up web service integrations.
* Creating SFDC reports (functional and technical documents).
* Create profiles, roles and configure permissions according to organizational hierarchy requirement.
* Developed applications using Agile methodology.
* Created Workflows for automated lead routing and lead escalation.

**Environment**Agile Salesforce Unlimited Edition Service Cloud Sales Cloud Apex VisualForce Pages Component Controllers JQuery JSON XML HTML CSS Workflow Approvals Reports Custom Objects WSDL Custom Tabs Eclipse/Force.com IDE.

**Salesforce Developer Oct 2017 – Jan 2019**

**TJX, Framingham MA**

**Responsibilities:**

* Involved in identifying, planning and implementing new Salesforce.com features and functions to meet business requirements.
* Developed batch interfaces and processes to integrate Salesforce.com with external systems.
* Developed various Custom Objects, Tabs, Entity-Relationship data model, validation rules, Components and Visualforce Pages.
* Developed wave dashboards using Salesforce platform as the backend.
* Developed apps and objects with Lightning in Salesforce.
* Created page layouts, search layouts to organize fields, custom links, related lists and other components on record detail pages and edit pages.
* Built Proof of Concept (POC) for the Inbound and Outbound modules to call the third party vendor API's using Mulesoft and Java.
* Created integration with Steelbrick CPQ and CLM applications and automating processes on salesforce1 platform
* Developed Java Script methods for doing two actions on a single button click, to overcome the Salesforce limitations.
* Solution Design for the Integration of the Confidential CPQ Data with the rest of the Enterprise applications.
* Customized Contacts in Salesforce org to store relevant marketing data points.
* Generated discover reports and presented campaign engagement statistics to business owners to direct future strategies and initiatives.
* Created journeys and also implemented marketing campaigns using marketing cloud tools like Journey Builder, Email Studio and Automation Studio.
* Implemented the requirements on Salesforce.com platform and Force.com IDE Plug-in using Eclipse.
* Implemented Veeva CRM and Vault on Force.com platform, integrated Veeva Vault with Veeva CRM, CLM admin tab configurations.
* Created workflow rules and defined related tasks, Time-triggered tasks, email alerts, field updates toimplement business logic.
* Worked on Business to Business (B2B) & Business to Customers (B2C) SFDC patterns involved interaction with all the various parties are involved. Integrated Salesforce with various third-party solutions.
* Created Reports and Dashboards with the help of Salesforce Wave Analytics to track Opportunity pipeline/Stages for Management visibility.
* Configure and Customize Advanced CPQ Approvals based on complex approval rules using a combination of Approval Process, Custom Controller Code and Customized Approval Templates.
* Responsible for writing SOQL & SOSL queries with consideration to Governor Limits for data manipulation needs of the application using platform database objects.
* Created Labels to set the predefined values for the client-side pagination process.
* Configuration of the CPQ using Products, Price Lists, Categories, Constraint Rules, Product attribute Rules, APEX Triggers and Workflows.
* Developed Custom Validations to override the Salesforce default validation rules.
* Used Force.com developer toolkit including Apex Classes, Apex Triggers and Visualforce pages to develop custom business logic.
* Worked on Implementation and post-production support on CRM applications.
* Worked on various AppExchange products according to the needs of the organization.
* Worked on various Salesforce.com standard objects like Case Management, Accounts, Contacts, Content, Reports and Workspaces.
* Used the Apttus software for contract management, which is acquired through the App Exchange
* Created Email Templates and Mail Merging Templates and was involved in doing the mail merge for different standard and custom objects.
* Creating a sync of contacts, email alerts, events and tasks between Salesforce to Outlook and Outlook to Salesforce successfully.
* Complete bulk imports of data using Apex Data Loader.
* Deployed the code developed in the Dev Sandbox to the Test Sandbox and the Production sandbox.
* Involved in Unit Testing, for the customizations and developments done during the project.
* Gathered user and functional system requirements via workshops, interviews and workflow storyboards and Working with stakeholders and project teams to prioritize collected requirements.
* Developed various integrations using Mulesoft as per the User Acceptance Criteria defined by the business users.
* Expertise in working on transformations in Mulesoft.

**Environment**Force.com IDE Apex Classes Apex Triggers VisualForce pages Validation Rules Formula Fields Data Loader Reports and Dashboards Workflow Approvals Web Services.

**Salesforce Architect Oct, 2014 – Oct 2017**

**KDP, Plano TX**

**Responsibilities:**

* Solution Design and Development for new Business Use Cases
* Customize the existing SAAS based CPQ running on Salesforce to add lot more flexibilities with attribute-based Pricing, Automated Asset Operations and approvals.
* Technical Solution Design Document preparation.
* Development of Customized flow for Pricing and Discount calculation for New Business, Asset Based Ordering, Upsell, Renewals
* Development customized flow of highly automated renewals, upsell
* Solution design to transform and migrate the existing Assets into Salesforce.
* Design and Development of custom modules for Facility based order and Pricing Logic.
* Configure and Customize Complex Pricing using a combination of Product attributes, Numeric Expressions, Custom Controller class modifications.
* Apex Trigger creation for Custom Field and Object Population related to Assets, Product, Line Item, Quote/Proposal, Approver Modules.
* Transform and migrate the C++, Java, Oracle Codebase into RHEL GCC compiled modules
* Transform and migrate the Webservices running on Solaris to RHEL
* Customize and Implement Nagios based Monitoring scripts and application
* Introduce and Customize new Linux Based scripts to implement Business Logic and Application Availability.
* Performance and Load Testing - Scripts - transformation and Customization in RHEL environment
* Design, develop, and Implement Real time - Disaster Recovery Solution in a Hybrid - Solaris, Linux, Windows Environment, with Data, Application and Code base getting replicated across 2 Data Centers
* Configure and Customize the Enterprise Integration End Points with Oracle CPQ, Oracle Confidential and Billing Systems, Salesforce CRM System, Custom on-premise CRM Application, Custom On-Premise Contract CLM System, Custom On-premise Document Generation Systems, SAAS hosted Credit Authorization App.
* Configuration and customization of Salesforce Layouts, Profiles, Permissions Sets based on the requirements.
* Data Extraction Transformation and Load of the Confidential Legacy Data into Confidential CPQ Data using combination of SQL scripts, Excel macro scripts and Salesforce Data Loader.
* End-End Testing of the CPQ Flow leveraging the functionalities of the Salesforce CRM, Confidential CPQ and Advanced Approvals.

**Salesforce Business Analyst June, 2011 – Sept, 2014**

**Stanford Hospital Palo Alto, CA**

**Responsibilities:**

* Conduct requirements elaboration sessions in salesforce CRM platform to review and validate business requirements.
* Manage all Business Objectives, Requirements, and Specifications Requirements in SFDC.
* Draft Use Cases for review by Business, Development, and QA teams to include process steps, alternate flows, acceptance criteria, objectives, and screen/report mock ups.
* Perform and guide BSA testing for SFDC Workflow.
* Administered Salesforce CRM applications for Sales, Marketing and Support Departments.
* Developed questionnaires for stakeholders, definition of the Use Cases and requirements along with control flows and user interface mockups in Visual Basic.
* Designed GUI and Navigation flows for the generic viewer facing the end user using MS power point, Visio.
* Perform and guide BSA testing for Salesforce application in marketing cloud.
* Developed field & page layout customization for the standard objects like Account, Contact and Leads.
* Defined functional and non-functional requirements to Use Case narrative using the UML diagrams.
* Maintained and gave permissions to communication templates based on Profiles.
* Worked on various salesforce.com standard objects like Accounts, Contacts, Leads, Opportunities, Reports and Dashboards.
* Designed, and developed the Custom objects, Record Types, Formula fields, Page layouts, workflow rules, tasks, emails and alerts to track customer related tasks and activities.
* Used field level security along with page layout to manage the visibility and accessibility of fields for different profiles.
* Customizing Company Profile, Security Controls and Communication Templates of the organization as per the organization requirements.
* Primarily involved in developing use case document for the application, traceability matrix, system requirement specification (SRS) and presentations for proposed solutions.
* Expert CRM Fusion User with advanced skills in Power Grid, Single Table Dedupe, Mass Lead Conversion, Lead to Account Deduplication, Mass backup, Mass Ownership changes.
* Supervised, examined and specify stakeholder needs.
* Worked on Record Types, Validation Rules, Triggers and Page Layouts.
* Develop and execute Test Scenarios, Test Scripts, test data documents based on Requirements and Design documents mostly in agile environment.
* Collaborated in Designing, developing, and deploying Apex Classes, Controller Classes, and Apex Triggers for email services and lead-to-contract conversion.
* Performed administrative activities on Sales, Service cloud by creating User, Roles, Profiles, Workflow rules and Approval process.
* Implemented salescloud and service cloud to improve customer retention and service delivery process improvement.
* Collaborate with QA and Development teams for requirements clarifications.
* Closely Work with the Development Team to understand the Technical Architecture and Technical requirements of healthcare Claims Workstation.
* Designed and developed Use Cases, Activity Diagrams, Sequence Diagrams, OOD (Object oriented Design) using UML and Visio.
* Managed and implemented customization requests by CRM Manager.

**Salesforce Analyst June, 2011 – Sept, 2014**

**Stanford Hospital Palo Alto, CA Responsibilities:**

* Worked on Service Cloud and Sales Cloud implementations.
* Implemented Email-to- Case, Web-to- Case entry and manual case entry for entering customer’s cases in Cases Tab.
* Identified various points of integration among the new and existing applications and required integration with other IT components. Employed Data Loader to read, extract, and load data from CSV files.
* Achieved comprehensive analysis of business practices and guided on ways to boost up the processes.
* Designed Profiles, Roles based on Organization role hierarchy and implemented Record-Level and Field-Level security and configured their sharing settings. Toiled on Record Types, Validation Rules, Triggers and Page Layouts.
* Developed various Custom Objects, Components, Controllers, Custom Reports, Custom Tabs, Labels, Visual force pages, Validation rules, Approval Processes and Auto-Response rules for automating business logic and Report folders for different users and profiles based on the requirement.
* Managed Auto response rules if customers approached beyond the business hours.
* Designed and developed SFA based Application on Force.com Platform in Salesforce.com environment with Apex programming language at backend and Visualforce pages as user Interface.
* Developed different Visual Force Pages to suit to the needs of the application using different Visual force components.
* Designed workflow rules and specify related tasks, time triggered tasks, email alerts, field updates to enable business logic. Designed workflows and allocated permissions within SharePoint.
* Performed Unit Testing and User Acceptance testing and documented detailed results.
* Involved in daily scrum meeting to discuss any roadblocks or impediments in the project path.
* Involved in sprint planning session to identify the features and functionalities that should be achieved by the new application. Hands on working experience in Role Hierarchy, Custom Profiles and public group's creation and user management. Created dashboards to present the reports per the user profiles
* Experience in Creating Roles, Profiles, Email Templates, Page Layouts, Workflow Actions and Approval Process.
* Coordinated and transferred knowledge to the offshore team.
* Testing and verifying using the Workbench to confirm that the data is saved accurately in the Salesforce database using the SOQL Queries for those fields that are not on the page layout
* Worked on various Salesforce.com Standard objects like Accounts, Opportunities, Leads, Campaign and Reports.
* Created various Custom objects, Tabs, Workflows, Reports, vi triggers and validation rules for the application.
* Created Email templates in Text, HTML and VisualForce necessary for the application.

**Environment**Java J2EE Spring MVC Web Services SOAP Restful XML XML parsers Ajax JSON JSP CSS3 HTML5 Hibernate JDBC UML SVN TOAD Eclipse

**Education:**

**Bachelor’s in CS Barkly International College 2011**

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