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Paul Dan

Improving business process solutions with CRM and Data science Technology

Business Analyst/Quality Analyst with over 6+ years of experience supporting business solution software and analyzing business operations. Aiming to utilize my strong prioritization skills and analytical ability to achieve the goals of your company.

PROFESSIONAL SUMMARY

Business Analyst and CRM functional consultant, experienced in assisting organizations to realize benefits through process improvement and software implementation. I work with business users understanding their processes and key drivers to building requirements documentation sets that are used to build software solutions and facilitate business change.

The majority of projects I have worked on focused on solutions centered on Salesforce, ZohoCRM, SugarCRM & SuiteCRM, Recruitment CRM (ATS), Finance and Mortgage System where I have configured the application directly or worked with development teams, both on and off-shore. These have been delivered following both Waterfall and Agile project methodologies.

My clients include a multinational FMCG, Health Care, Finance and Mortgage Company, Recruitment Company, Pharmaceutical Companies, and Manufacturing and Retail businesses.

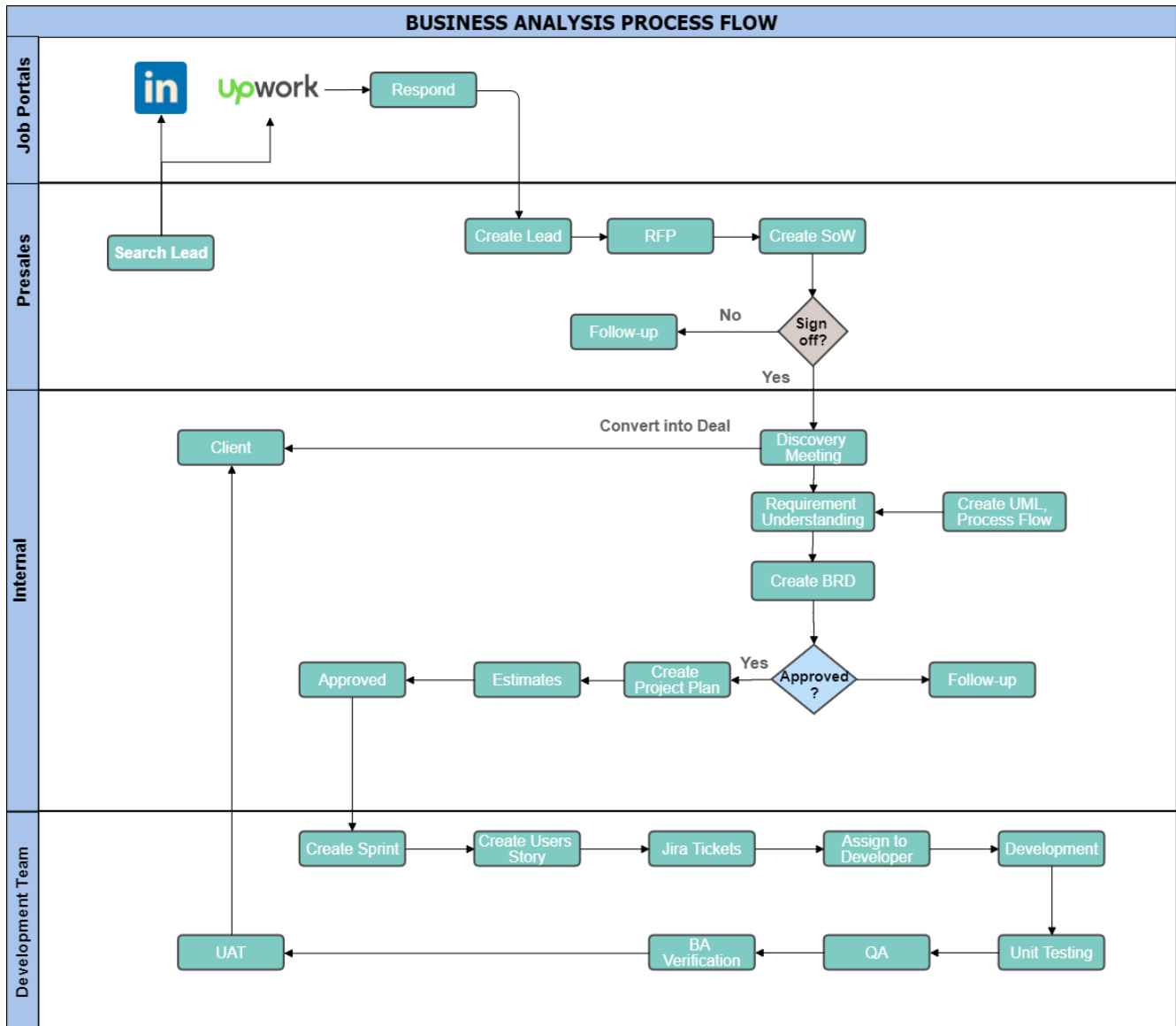
Key Skills:

- Requirements elicitation, analysis, and validation
- CRM configuration and development, including entity model design, workflows, dialogs, business rules, business process flows and reporting
- Data Migration
- Test Management and test case automation
- SugarCRM/SuiteCRM, Recruitment CRM (ATS), Finance and Mortgage System Training

Technical Skills:

- Use Cases, UML and User Stories
- SugarCRM 7.9, SuiteCRM 7.10.x, Microsoft Dynamics CRM, Salesforce, ZohoCRM, Recruitment CRM (ATS), Finance and Mortgage System.
- MS Office, Balsamiq, Cacoo, etc.
- Servers (AWS)

BUSINESS ANALYST PROCESS FLOW (END TO END ROLE AND RESPONSIBILITY)



PROFESSIONAL EXPERIENCE



CRM Experts Online (crmexpertsonline.com)

Sr.Business Analyst (Payroll)

Staten Island, New York

Jun 2020- Present

- Negotiate and liaise between business teams, technology teams, and support teams
- Worked with users and stakeholders to analyze and validate requirements
- Manage project through status meetings, weekly reports, identifying risks, and tracking issues
- Designed, developed, and deployed business intelligence applications
- Execute and validate test cases
- Responsible for specifications, implementations, and analytics
- Prepared business models, flowcharts, and diagrams



Eway IT Solutions Pvt Lmt (<http://ewayitsolutions.com/>)

Business Analyst/Quality Analyst

Ujjain, MP, India

Dec 2019- May 2020

- Engage client to gather software requirements/business rules, and ensure alignment with development teams
- Translate stakeholder requirements into different deliverables such as functional specifications, user cases, user stories, workflow/process diagrams, data flow/data model diagrams.
- Evaluate risks related to requirements implementation, testing processes, project communications, and training.
- Identify and reconcile errors in client data to ensure accurate business requirements.
- Draft and maintain business requirements and align them with functional and technical requirements.
- Facilitate monthly meetings with clients to document requirements and explore potential solutions.



ADVANZ101 Business Systems Inc (<https://www.advanz101.com/>)

Business Analyst/Quality Analyst

Indore, MP, India

March 2015 – Dec 2019

- Develop business architecture using requirements such as scope, processes, alternatives, and risks.
- Analyze client's business requirements and processes through document analysis, FSD, BRD, interviews, workshops, and workflow analysis.
- Conduct 5+ levels of testing including functional, regression, user acceptance, integration and performance to verify the client's needs are met.
- Communicate client's business requirements by constructing easy-to-understand data and process models.
- Provide input into developing and modifying systems to meet client needs and develop business specifications to support these modifications.



Al Salem Johnson Controls (<https://york.com.sa/>)

Onsite QA coordinator for Power BI Project at Al Salem Johnson Controls- Jeddah, Saudi Arabia

Jeddah, Saudi Arabia

June 2019-July 2019

- Responsible for analyzing & understanding the requirements, created test plan, test script.
- Shares the FRD (functional requirements document) and works on making a test plan.
- Provided testing efforts and estimations to the Client based on the project requirements.
- Test case designing & creation using manual process and test cases review with the client.
- Review the test scenarios/Test cases with internal and client's team.
- Communicate timelines, progress, delays, etc back and forth from the team to the client and vice versa.
- Provides input on the test data preparation phase.
- Attended Client and status meetings with internal and external teams, participate in scrum calls.
- Support UAT

EDUCATION

Alpine Institute of Technology

Bachelor of Engineering in Electronics and communication

- GPA: 7.8/10

Ujjain, MP, India

June2010-June2014

CURRENT PROJECTS

- eGrant (Australia- <https://www.dlgrma.qld.gov.au/>)
- Department of Local Government, Racing and Multicultural Affairs (DLGRMA- Australia)
 - Technologies: **Microsoft Dynamics**, Portal Application

- Brief: The following are included in the scope of the project:
 - Full end to end processes, including ability for applicants to lodge electronically (incorporation of the Grants Portal),
 - Strengthen financial reporting capability, including whole of Program reporting against baseline and revised budgets, and Forecast reporting,
 - Multi-program reporting capability with different funding disbursement requirements, e.g. progress payment vs allocation,
 - Ability to generate historical reporting consistently from a data warehouse to support briefs
 - Ability to report across multiple funding sources,
 - Alignment with the Queensland Grants management data policy, and
 - Data conversion from existing systems.

- Synnex (US- <https://www.synnexcorp.com/>)
 Synnex Corporation, founded in 1980 by Robert T. Huang and based in Fremont, California, is an information technology supply chain services company offering services to original equipment manufacturers, software publishers and reseller customers.
Brief: Implementation of Existing Module, Code Customization, Cases Creation from Email/Chat, Order SLA Breaching, Compose Email Customization, Team & Role Management, Rest API etc.

- Betterplace CRM (Indian Client- <https://www.betterplace.co.in/>)
 - Technologies: SuiteCRM/SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Lead Module implementation & Customization, Email Notification, SMS Integration, Website Integration, Code Customization, PDF Generation, CSV Upload Customization, Team & Role Management, Reports, Security Group Management, etc.

- Johnson Control (Saudi Arabia/ Onsite QA Coordinator- <https://york.com.sa/ar/>)
 - Power BI report Development and Testing

- Khaleej Digital (France:- <http://crm.groupe2r.com/2RCRM>)
 - Technologies: SuiteCRM/SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: High-level Customization in existing modules, Clients, Business Opportunity module, Stock Lots, Accounting, HR, Documents etc
 - Custom Workflow Implementation, Logic Hooks, Custom Script, Custom Dashboard,
 - Implemented Library function, Email Notifications, Security Group setup, etc.

- Eastern Hay (US Client- <https://www.easternhay.com/>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Customization of Accounts, Contacts, Opportunity etc., High-level customization in Quote/Order Module, QuickBooks Integration with SuiteCRM where syncing products, vendor data etc. SMS Integration, Code Customization, PDF Generation, CSV Upload Customization, Team & Role Management, etc.

- Meera Neuro Client:- (Indian Client- <https://www.theneurocare.com/>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Customization of Accounts, Contacts, Meetings, Calls, Tasks
 - Patient registration process, Store and retrieve the patient profile, Prescription Management, Scheduled appointments and managing on calendar screen, Medicines and Diagnosis Management, etc.
 - Patient Mobile App – Appointments Booking Mobile App,

- ReddyICE Application (US client- <https://www.reddyice.com/>)
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Integration from ODS and third party tool, customization of existing module-Accounts, Contacts, Opportunity, Leads and Many more, Lead Management System, Order Management, Implementation of REST, SOAP and D&B API's.

- SLA setup, Product and their pricing, Email Scheduling, Code Customization, webform/PDF Generation, Custom Calendar, CSV Upload Customization, Team & Role Management, LDAP Server Authentication, Rest API etc.
 - Distributor Portal implementation- External Vendor login, Order creation, Lead Management in the CRM.
- NYDDC (Defensive Driver's) (US client- <https://www.newyorksafetycouncil.com/>)
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Instructor, Students, Classes, Certificate implemented in SugarCRM application, Email Scheduling, Code Customization, PDF, Excel & text file Generation, Role Management etc.
- NetMeds Application (India ki Pharmacy- <https://www.netmeds.com/>)
 - Technologies: SuiteCRM, PHP and MySQL
 - Brief: Implementation and customization of Existing Modules, Prescription Management, Case Management system.
 - Case Creation from email/Chat/Website and Assignment of cases based on lowest work load, Chat box integration with SuiteCRM, Case creation from chat.
 - SLA Breaches, Team Management/Security group management.
 - Email Notification, Inbound Email, Outbound Email
 - Call Center Integration (Teckinfo Call Center), Developed custom APIs for call center, Code Customization, Rest API, Security Suite Group Management & Role Management etc.
 - Workflow Management/Custom Script, Logic Hooks, etc.
- FarmJournal Media (US Client- <https://www.fjmcrm.com/>)
 - Technologies: SuiteCRM, PHP and MySQL
 - Brief: Implementation and customization of Existing Modules, Migration of Data from excel to SuiteCRM, Outlook Integration with SuiteCRM, etc.
 - Order form Integrated with Website, Email Notification, etc.
- Grant Industries CRM (US Client- <https://www.grantinc.com/>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Existing Module and Code Customization, Product Formula Generation, Product and their Pricing, supplier management, PDF Generation, Excel print, other print as well etc.
- Cairns Solutions CRM (UK Client- <https://www.cairnsolutions.com/>)
 - Technologies: **SuiteCRM**, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Implementation of Custom module and Customization of Existing module, Work Flow Implementation, Zoho CRM Data Import to SuiteCRM, Custom Script, Workflow setup etc.
- Vrijwilligers Vacaturebank (Netherlands- <https://www.vrijwilligersvacaturebank.nl/>)
 - Technologies: **SuiteCRM**, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: VrijwilligersVacature Bank (VVB) and SuiteCRM Integration by using the REST API. VVB Job portal and contact integration with SuiteCRM
 - Jobs and Volunteers Management, Job interview Invites, Job Application Management,
 - Custom Script and logic Hooks, Workflow Management, Payment Integration etc.
- Vento Net (Mexico- <https://www.vento.com/>)
 - Technologies: SugarCRM Professional Edition to SuiteCRM
 - The migration timeline from inception to go live was 20 working days. The project was delivered on time, on budget and to specification.
 - We have migrated all the functionalities and data from SugarCRM Pro to SuiteCRM. Before adding new/enhanced functionalities, we have migrated the existing modules such as Account, Contacts, Opportunity, Cases, Prospects and Quotes and various others important modules along with their respective data from SugarCRM Pro to SuiteCRM. Our system migration approach is to perform detailed analysis of the existing system for better effectiveness in migration of functionalities and data to the new environment. This way we always retain the relationship between the modules, fields or records that are critical for the new system work effectively.
- Vento Credit Company (Mexico- <https://www.vento.com/>)
 - Technologies: **SuiteCRM**, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Vento Motorcycles customer and their credit management, Accounts Payables and Receivables, Budget, Credit Request, Generation of document, Notes, Invoices, Payment Schedule etc.

- Product, Credit Plan and Calculations
- Phibrows Microblading Academy USA (<https://beautyangelsacademy.us/>)
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Instructor, Students, Classes, Certificate implemented in SugarCRM application, Email Scheduling, Code Customization, PDF, Excel & text file Generation, Role Management etc.
- Ajanta Bottle Pvt Ltd (<https://www.ajantabottle.com/>)
 - Technologies: **SuiteCRM**, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Implementation of Leads module and Customization of Existing module, Work Flow Implementation, etc.
- Arogya Retail (Indian Client- <http://www.arogyaretail.com/Store.aspx>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: SMS Integration, Code Customization, PDF Generation, CSV Upload Customization, Team & Role Management, Excel & billing print, other print as well, etc.
- Hudson Solar (US client- <https://us.sunpower.com/dealers-installers/hudson-solar>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Opportunity module customization, Email Scheduling, Code Customization, PDF Generation, CSV Upload Customization, Team & Role Management etc.
- Stumpup CRM (UK Client- <http://stumponline.co.uk/>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Custom Module implementation & Customization, Email Scheduling, Code Customization, PDF Generation, CSV Upload Customization, Team & Role Management etc
- Vow to be Chic (US Client- <https://www.vowtobe chic.com/>)
 - Technologies: SugarCRM Professional Edition, JQuery/JavaScript & Ajax
 - Brief: Migration of ZohoCRM to SugarCRM, Appointment Implementation, Custom Calendar setup, Assignment of appointment based on round robin methodology, Integrated Magento website to SugarCRM. Email Notification.
 - Implementation of Calendar Functionality for Booking & Scheduling.
- Akin- (UK Client- www.chert.ng)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Existing Module customization, Code Customization, Team & Role Management, etc.
- Diamond CRM- (Ayssa Murphree-)
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Existing Module customization, Code Customization/Optimization, etc.
- Consumer Data Leads International Project (US Client)
 - Technologies: SuiteCRM, MySQL, JQuery/JavaScript & Ajax
 - Brief: Lead Management, Webform integration with SuiteCRM, Email Notification- Welcome email, Order Creation etc. User, Role and Team Setup.
- New Wire Marine (US Client- <https://newwiremarine.com/>)
 - Technologies: SugarCRM Professional Edition, JQuery/JavaScript & Ajax
 - Brief: Quote Management setup, Webform integration with SuiteCRM, Product, Product Category, Assignment of quote to internal team, Email Notification- Welcome email, Quote/Order Creation etc. User, Role and Team Setup.
- CDL International
 - Integrated with woo-commerce website with Plugin and Api's
- Nano Heal (Indian Client- <https://nanoheal.com/>)
 - Technologies: SuiteCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: Implementation of Custom module and Customization of Existing module, Work Flow Implementation, Custom Script, and Workflow setup etc.
- Living Your Choice (US client- <http://crm.livingyourchoice.com/>)
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax
 - Brief: Calendar Integration, dash let customization etc
- ChiBall
 - Technologies: SugarCRM, PHP, MySQL, JQuery/JavaScript & Ajax.
 - Brief: SugarCRM Rest API Integration
- Rockfordil (<https://rockfordil.com/>)

In this project we have used SugarCRM API to fetch data and show on UI with search functionality also can download PDF & Excel file.

Key : SugarCRM Rest API Integration

ADDITIONAL SKILLS

- Proficient in Microsoft Office (Word, Excel, Outlook, PowerPoint, Visio).
- Expert knowledge of SQL and relational database management systems.
- Familiar with Water Fall, Agile software development methodology.

PERSONAL DETAILS

Date of Birth: 17th July 1989
Nationality: Indian
Father's Name Mr. Surendra Singh Panwar (Farmer)
Mother's Name Mrs. Shyam Kunwar Panwar
Languages Hindi, English, Malwi
Permanent 23 N Sanchar Nagar Kanadiya road Indore (MP)

INTERNET FOOTPRINTS (ONLINE IDENTITY)

LinkedIn : <https://www.linkedin.com/in/paul-d-a375b120a/>

HOBBIES AND INTERESTS

- R&D Over Internet and learning E-Commerce technologies
- Technical Troubleshooting
- Adventure Activities

Declaration

I solemnly declare that the above mentioned details are veracious to my knowledge.

Date:

Place

Paul D