



Venkat Y
Salesforce Billing/CPQ Consultant

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Professional summary:

- Having 7 years of IT Experience and 4 years of relevant experience in Salesforce Implementation.
- Actively participated in all the phases of SDLC (Plan & Analysis, Design, Build, Test, Deploy) and has good experience in working in Agile project teams and interacting with customers. Having great analytical and Problem-Solving Skills and has experience in translating business objectives into technical requirements/design and estimating the efforts to accomplish the customer objectives covering all aspects of the functionalities.
- Hands on experience in Configuring, Customization, Support, Security, Testing and Administration on Salesforce.com.
- Has good knowledge of the Technical and Functional aspects of Salesforce.com, on demand CRM package.
- Having good experience on Salesforce CPQ and Salesforce billing.
- Create and manage custom objects, fields, formulas, process builder validation rules, custom workflow, and approval processes.
- Configured Products, Bundles, Bundles with Hierarchies, Price List with across all products
- Extensively used Apex Data Loader in Data Migration Activities.
- Having good experience on Testing, Production Support.

Professional Experience:

- Working with Atidan Technologies Pvt Ltd as an Associate Lead, Mumbai from Feb 2023 – Present.
- Worked with Cognizant as Associate Projects, Bangalore from Sept 2021 – June 2022.
- Worked with Epsilon as Consultant, Bangalore from Feb 2016 – Aug 2021.

Areas of expertise:

- Salesforce CPQ
- Salesforce Configuration and Customization
- Lightning Experience
- Data Loader
- Congo Composer
- Workflow, Process Builder, Flow
- Salesforce CRM

Work Experience:**Project #1: Confidential****Roles and Responsibilities:**

- Worked on various Salesforce standard objects Accounts, Contacts, Leads, Opportunities.
- Analysed Requirements, involved in the development of all modules.
- Product Configuration according to the requirement.
- Quote Template according to the requirement.
- Installation and configuration the settings of Salesforce Billing with the Salesforce.
- Develop, maintain, create, and improve validation rules, custom workflows.
- Implemented Amendment, renewals and Cancellation.
- Configuration bundles product and standalone product.
- Implemented Workflow Rules, Process Builder and Flow for automation.
- Worked on Profiles and Permission sets.
- Implemented of billing flow from opportunity to refunds.
- Implemented various Payment to meets business requirement.
- Implemented various invoice generation, invoice scheduler.
- Worked on Profile level & user level permission to fields, object & Tabs.
- Worked on configuration of billing rule, billing treatment, Tax rule, Tax treatment, Revenue recognition, Revenue schedule, Revenue transaction.
- Involved in Data migration tasks using data loader.
- Worked on generation invoice from Bill now and invoice scheduler.

Project #2: Confidential

Roles and Responsibilities:

- Worked on various Salesforce standard objects Accounts, Contacts, Leads, Opportunities.
- Created and configured Bundles and Products and Implemented Summary variables, Option constraints and Product rules for the bundles.
- Created Formula Fields, Validation Rules for the flexibility and functionality of force platform application.
- Created Page Layouts, Search Layouts to organize fields, custom links, related lists, and other components on a record detail and edit pages.
- Implemented various price rules to meet business requirements.
- Implemented Configuration attribute and custom actions and discount schedules.
- Implemented Workflow Rules, flow and Process Builders for Automation.
- Implemented sharing rules, Roles.
- Worked on profiles and permission sets.
- Involved in Data migration tasks using data loader.
- Involved in Deployment of Field, objects and code from Sandbox Environment to Production with the help of both Change sets.
- Worked on billing flow from Opportunity to refunds.
- Created and configured Bundles and billing products.
- Implemented various invoice generation to meets business requirement.

Project #3: Confidential

Roles and Responsibilities:

- Worked on creation custom fields, Twin fields page layouts, record type custom object.
- Worked on various Salesforce standard objects Accounts, Contacts, Leads, Opportunities.
- Installation and configuration the settings of Salesforce Billing & Salesforce CPQ with the Salesforce.
- Created and configured Bundles and Standalone Products with billing configuration.
- Worked on amendment (Increasing, decreasing quantity & cancellation) & Renewals

- Worked on Cancellation rule & Testing with different dates.
- Worked on QTC.
- Worked on ordering and contracting processes.
- Worked on Quote template.
- Worked on Profile level & user level permission to fields, object & Tabs.
- Implemented Workflow Rules, flow and Process Builders for Automation.
- Worked on migration with change set (custom fields, custom object, custom button, process builders, workflow, profiles).
- Worked on configuration of billing rule, billing treatment, Tax rule, Tax treatment, Revenue recognition, Revenue schedule, Revenue transaction.
- Worked on generation invoice from Bill now and invoice scheduler.
- Worked on Usage summary Product.

Project #4: Confidential

Roles and Responsibilities:

- Worked on creation custom fields, page layouts, record type custom object.
- Worked on various Salesforce standard objects Accounts, Contacts, Leads, Opportunities.
- Installation and configuration the settings of Salesforce Billing with the Salesforce.
- Created and configured Bundles and Products with billing configuration.
- Develop, maintain, create, and improve Contracts, order, multiple order, invoice generation, payment, credit note, debit note, invoice scheduler, invoice plan, Tax setup, and Payment scheduler.
- Worked on amendment (Increasing, decreasing quantity & cancellation) & Renewals
- Worked on Cancellation rule & Testing with different dates.
- Worked on QTC.
- Worked on ordering and contracting processes.
- Worked on data loader for legacy data migration activity for all objects including amendment & renewals.
- Worked on Profile level & user level permission to fields, object & Tabs.
- Implemented Workflow Rules, flow and Process Builders for Automation.

- Worked on migration with change set (custom fields, custom object, custom button, process builders, workflow, profiles)
- Worked on configuration of billing rule, billing treatment, Tax rule, Tax treatment, Revenue recognition, Revenue schedule, Revenue transaction.
- Worked on generation invoice from Bill now and invoice scheduler.

Project #5: Confidential

Roles and Responsibilities:

- Worked as a salesforce admin and was involved in Solution Designing, building, and unit testing.
- Developed workflow rules and process builder and deployed using change set.
- Worked closely with the Business team to understand the requirement to enhance user experience and make the application user-friendly.
- Worked on Salesforce billing generation of orders, invoices, and payments.
- Worked on quote post payments methods.
- Created custom labels and custom settings.

Project #6: Confidential

Roles and Responsibilities:

- Analyzed business requirements and proposed feasible solutions in Salesforce CPQ
- Configured Product Rule, Price Rule, and Price Dimensions as per the current pricing mechanism of the client.
- Interacted with the client to gather business requirements and demonstrate solutions.
- Fixing of defects reported by the QA team if any.
- Used workflows, process builder, validation rule, and formula fields as per the requirement.

Education:

M.Tech in VLSI & Embedded Systems from JNTUK in 2012.