**Janak Patel**

**Salesforce 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.
* Strong technical background with good understanding in software development in Salesforce.com technologies.
* 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.
* Leading high performing onshore/offshore teams and delivery of projects within time, and quality parameters.
* Collaborate with internal and external stakeholders on solutions related that require Salesforce.com.
* 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 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.
* Worked on various salesforce.com standard objects like Accounts, Contacts, Leads, Opportunities, Reports and Dashboards.
* 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.
* Performed ongoing Salesforce.com administration/development tasks like (create accounts / profiles, defining fields, updating layouts, reports, dashboards etc.) and development (using Apex & Visual Force).
* 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.

**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 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 batch interfaces and processes to integrate Salesforce.com with external systems.
* Developed Java Script methods for doing two actions on a single button click, to overcome the Salesforce limitations.
* Responsible for configuration, operational support, administration and performance of Salesforce Instances.
* 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.
* Administered, configured, maintained Salesforce.com application user profiles, roles, assigning Permissions, generating security tokens, validation Rule, upgrade installation.
* Development customized flow of highly automated renewals, upsell
* Solution design to transform and migrate the existing Assets into Salesforce.
* Built CTI adapters with Salesforce CRM call center uses to integrate with their Salesforce Softphone.
* 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.
* 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 sales cloud 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.
* 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.

**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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