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OBJECTIVE

To offer maximum effort in an administrative accounting role that will allow me to implement a combination of extensive account management skills, substantial administrative abilities, positive self-motivated attitude and business applications expertise that accomplishes maximum results for a welcoming and established business.

EXPERIENCE

Independent Contractor (Real Estate) | 2021

Providing real estate service assistance remotely for independent brokers. Currently working with 2 clients remotely.

- Receive residential rental property information and photos from broker to publish listings online (Craigslist, Facebook Marketplace and Avail.co)
- Manage rental listings' process until expiration
- Provide as point of contact for agents and forward potential tenants for screening
- Maintained self-made spreadsheets to organize and track listing process
- Assist with broker's existing customers to manage initial payments from the invoice to payment received until closure

Clean.Tech

Clean.Tech is a retail solar partner using proprietary deep-learning A.I system that performs complex design and engineering tasks autonomously, in real time, for each construction project. Installing solar with over 100 electrical contractors across the U.S with an iOS app platform.

Project Coordinator | October 2020 – December 2020

- Project management for all California and Arkansas solar installation contractors with continued communication to maintain timely solar installations; including creating project agreements, document management and tracking permit status until permission to operate is granted with utility companies for homeowners
- Production coordination with fulfillment team to manage materials for install, design updates, main panel upgrades and permit management for needed contractors
- Consistent note management in NetSuite platform with exclusive details to provide to sales with current updates
- Maintained self-made spreadsheets to organize and track completed welcome calls, upcoming engineering and contractor details
- Report maintenance to conduct calls to homeowners during specific milestones of entire solar project until complete

- Participated in upper management Zoom call meetings twice weekly and self-scheduled weekly individual contractor meetings
- *Reason for leaving : Start-up business not in financial position to provide increase on new position so decided I was no longer a good fit*

Customer Success Manager | July 2020 – October 2020

- Performed introductory calls to homeowner after transaction took place with salesperson to explain financial and solar installation expectation for all of the U.S territory
- Managed reports through NetSuite platform to keep updated notes on current status of introductory calls, finance status and needed sales and internal communication notes.
- Maintained current updates within Accelo platform to match updates within NetSuite system to keep salespeople informed on the status of each project
- Communicated with salespeople on status of homeowner finance to determine if project provide needed information to track financial status to continue to move forward to installation process
- Participated in upper management Zoom call meetings daily
- *Internal Promotion: Determined that with previous solar installation experience and current performance to promote to Project Coordinator*

CBRE

CBRE is best known as a broker of sales and leases of commercial real estate such as offices, warehouses and shopping centers. It has been expanding its property management services to grow revenue and provide reliable income that is not dependent on real estate cycles.

Business Operations Coordinator | June 2019 – July 2020

- Responsible for processing AP transactions such as vendor invoices and expense reports, setting up Listings and Project Budgets, Billing and Accounts Receivables, Contract Administration, Licensing, Revenue Forecasting and Transaction Processing
- Coordinated the timely entry and processing of standard AP transactions and researched vendor invoices and expense reports
- Coded and allocates expenses within appropriate system such as PeopleSoft. Researched invoices and payment inquiries.
- Reviewed and entered standard agreements and/or transactions such as: listing, management, valuation, leasing and sales into appropriate system (PeopleSoft, MTA, VAS, I-track, etc.)
- Created corresponding file(s) that was compliant with company and state requirements
- Assisted other departments in obtaining necessary verifications from sales professionals on various contingencies in order to adhere to the Company's revenue recognition policies
- Prepared billing requests for non-transaction items such as client marketing reimbursement and/or employee reimbursement
- Maintained property signs inventory. Ordered installation and removal of all property signs for the office
- *Reason for leaving : Department initially reduced hours due to COVID-19 to later eliminate the need for my position for the territory I managed*

Creative Energy Foods

Creative Energy Foods, Inc. is part of the Food Wholesalers Industry as a premium energy bar manufacturer for the State of California.

Customer Care Representative | August 2018 – February 2019

- Provided customer care advocacy to 2 of the 4 top customers as primary contact for all correspondence

- Received and entered monthly contract orders for highest producing customer and tracked production attainment
- Organized shipping documents daily for the warehouse to prepare finished goods for shipments to meet commitments
- Utilized SYSPRO software to manage inventory, entering all orders, billing and monitoring finished goods
- Created spreadsheets to organized information for customer care and best business practices
- Communicated with potential customer to provide information to start or continue their intended venture
- Worked closely with production, purchasing and planning departments to ensure production scheduling
- *Reason for leaving : Moved out of the area for family emergency*

Fidelity Home Energy

Fidelity Home Energy was a Guild Master Award Home Improvement and Clean Energy company which had been in the industry for over 20 years. They offered quality residential home improvement projects to customers throughout the Bay Area, California. Products included Residential Solar Energy Systems, HVAC systems, Residential Windows, Roofing and Exterior Coating.

Production Administrator | May 2017 – August 2018

- Monitored production activities for installation products, including solar, roofing, windows, Tex-cote and HVAC
- Worked directly under production/installation manager to assist in managing monthly production goals
- Directed by owner on calculating costing and project management
- Coordinated with county/city building departments and homeowners association to obtain needed approval
- Managed subcontractors, including creating job proposals, monitoring job sites and reviewing completion
- Conducted on-site visits to customers to ensure customer satisfaction and quality control
- Created par sheets and manage document and workbooks updates for sales price books and record keeping forms
- Coordinated closely with accounting department to assist in collection of outstanding balances
- *Reason for leaving : Business closed*

Del-Rose Insurance Company

Del-Rose Insurance has been helping clients prepare for the unknown by offering home, renters, auto, fire and other insurance products along with DMV services since 1988. A trusted insurance provide for the Bay Area, California.

Limited Lines Agent (Contractor) | April 2016 – July 2017

- Studied and obtained Limited Lines Insurance License with first attempt as of April 2016
- Gathered needed information from potential customers to provide comparison car insurance quotes
- Completed car insurance sales and reported car accidents/incidents to insurance companies with assistance of Broker including insurance rate and premium data entry, collecting car photos, providing insurance cards, clearing customers through DMV government website and collecting insurance premium payments.
- *Reason for leaving : No longer needed contracting work for Bookkeeping and hired family member to become Limited Lines Agent for office*

Bookkeeper (Contractor) | July 2015 – July 2017

- Maintain accounting and financial records with QuickBooks software with direct report to Business Owner
- Re-organized and created systems for new filing procedures
- Studied and obtained Limited Lines Insurance License with first attempt as of April 2016
- Assist in any business legal matters that involved financial matters, i.e. annual taxes and collections
- Processed and control reconciliation and year end statements for comfortable transition to tax accountant

- *Internal Promotion : Asked to obtain Limited Lines Agent license to assist in insurance sales and DMV transactions*

Nexcut Shredding | Bookkeeper (Contractor) | November 2013 – February 2016

Piedmont Pacific Corporation | Bookkeeper (Contractor) | July 2010 – August 2013

EDUCATION

Laney College | Business Administration/Accounting | 2016 – Present

Microsoft Word Certification | Berkeley Adult School | 2004

Administrative Medical Assistant Certification | Berkeley Adult School | 2004

General Education Diploma | Vista Alternative School | 2000

AWARDS AND ACKNOWLEDGEMENTS

- CBRE granted annual salary performance increase by December 2019 to \$55,600 to \$58,100 and received recognition for being with Top 3 for production in all responsibilities for Quarter ending 2020
- General Business Certification through Harvard ManageMentor

SKILLS

- Expert with business applications and platforms
- Typing 70 WPM an 10-Key by touch
- Extraordinary work ethic with over-achieving approach for maximum results
- Strategic thinking towards problem-solving
- Detail-oriented with strict professional standards
- Ability to manage assignments with priority and grace under pressure
- Some Spanish & Chinese Mandarin (conversational)

SOFTWARE

- Microsoft Office 365 including Word, Excel, PowerPoint and Outlook
- QuickBooks Pro 2019 and Online 2020
- NetSuite
- G-Suite
- Accelo

- SYSPRO
- Peoplesoft
- Oracle
- MTA
- VAS
- I-track
- ADP