# **Profile**

Seasoned professional with 14 years of operations experience. Currently working with Netsuite, cloud based management software since last 5+yrs helping address organizations daily business need.

**EDUCATION**

NetSuite Essentials Training **Apr ‘10**

Temple University, Philadelphia, PA Bachelors, International Business and Marketing  **May ’02**

# **STRENGTH**

Ability to go to the core of the problem, quick learner, team player, sincere with a positive attitude towards work and life. I believe that my desire for continuous learning, nurturing good relationships and pursuit of excellence will help me become a better person and a professional.

**NETSUITE SKILLS**

NetSuite CRM/ERP. Oder to Cash, Lead to Customer, Procure to Pay, Custom Financial Reports using NetSuite platform, Advanced Saved Searches, Data Migration, SuiteFlow, SuiteAnalytics and other customizations using NetSuite platform.

# **Experience**

# NetSuite Consultant, Cognizant Inc, NJ July ’16 – Current

**Client: Qlik Inc, PA**

* Daily CR (Client Request) Management on fixing current issues, new enhancement and bundles.
* Custom reports and saved search creation.
* Work Flow creation and enhancements
* New Bundle for Electronic Payment Processing Demo and implementation.
* Assigning and managing of sore development work.
* Dashboard customization
* User training on new feature and process I n NetSuite

# NetSuite CRM Consultant/ Admin., Hired By Matrix Inc, NJ Mar ’16 – July ‘16

**Client: Axioma INC , NY**

* Designed reports, KPIs & scorecards based on roles and reporting needs.
* Creating custom reports and searches.
* Dashboard customization
* Data migration via CSV imports
* NetSuite OneWorld Financial Process Implementation and Opportunity to Invoicing automation using Workflow
* Creating custom forms, fields, lists and records
* Advanced Saved Searches, Data Migration, SuiteFlow, SuiteAnalytics
* Maintain the NetSuite application for internal users.
* Support end user requests for new saved searches, reports, KPI's, and dashboards. Monitor end-user usage of systems and track performance.
* Provide internal, on-going system/technical support to users, including training and maintaining proper system access for all roles.
* Develop, test and deploy customizations, custom objects, new functionality and Suite Apps based on evolving business needs.
* Develop, document and implement policies, procedures and guidelines to ensure data integrity, changes protocols, customization, usage etc.
* Identify, evaluate and recommend other key technologies required to support and improve the business process centered on the NetSuite platform.

**NetSuite OpenAir PSA - PM/ Lead Consultant** **Jan ’16 –Feb’16**

# Client: Delta Rick LLC, A Chertoff Group Company, Arlington, VA

* Time Tracking
* Reporting / Dashboard
* Resource Management
* Expense Tracking
* Project Accounting
* Data Migration
* Integrating into QuickBooks (Invoicing)
* Creating Training Documents and end user training (PM, Resources & Admin)

# NetSuite Financial Consultant/ Admin., SumPositive, LLC, CT Sep ’15 – Dec ‘15

**Client: DC Bar, Washington DC.**

* Management of customer and vendor records and accounts
* Customizations of forms and fields
* Configuring and implementation the following NetSuite Cloud ERP system
* Accounting
* Financials
* Setup accounting, billing / invoicing forms to reflect all required information.
* Designed reports, KPIs & scorecards based on roles and reporting needs.
* Creating custom reports and searches.
* Dashboard customization
* Walk through and training on an ongoing basis on different business processes.

# NetSuite Consultant, Charter Global, Inc, Atlanta, GA April ’15 – Oct ‘15

**Client: Lyon & Healy Harps, Inc. Chicago, IL**

**Playing multiple roles for he client:**

# Consultant

* Requirements gathering, creating BRD and design documents
* Configuring and implementation the following NetSuite Cloud ERP system
* Order Management,
* Manufacturing
* Financials
* Setup accounting, inventory management & billing / invoicing
* Designed reports, KPIs & scorecards based on requirements
* Master data cleanup, migrating data into NetSuite (Customer, Item, Bill of Material, Sales Orders, Inventory, General Ledger, Vendors) using NetSuite CSV import files.
* Creating custom fields and forms to reflect their legacy system.
* Setting warranty & repair bundle.
* Creating custom reports and searches.
* Dashboard customization
* Walk through and training on an ongoing basis on different business processes.

**NetSuite Financial Report Writer, Randstad Technology, NY,NY(contract)June’15- Aug’ 15**

**Client: NPD Group, Inc. NY, NY (short term project)**

* Creating Custom Financial reports, P&L, Balance Sheet, Matrix report ,etc.

**NetSuite Consultant, McGladrey, LLP, Moorestown NJ Oct ’13 – Oct ‘14**

Worked on numerous projects for different clients, assisted Project Manager and Lead extensively through various phases until go live. Following is a brief breakdown of my activities on the following projects.

**Client: Ford Models LLC QA Consultant LLC NY, NY**

* Responsible for testing NetSuite's on-demand web-based, ERP/CRM/Net Commerce application
* Writing test plans for new product features
* Designing, implementing and running automated tests
* Executing test plans
* Lead to Customer process
* Solely responsible for Order to Cash process
* Data migration via CSV imports
* Financial Process Implementation
* Creating customized reports using standard reports and saved searches
* Creating custom forms, fields, lists and records
* Customizing dashboard KPIs (custom published dashboards based on roles)

Company generated thousands of sales orders daily via online, retail and call center sales channels. On- line and call center channel sales came via credit card as the major payment method where ACH was the primary payment method for retail channel. Each business unit has a separate bank account that receives payment deposits daily. Accurate reconciliation of deposits was a major challenge in accurate financial reporting. I had to understand all the parts involved in bringing in revenue and implemented a reconciliation process that lead to accurate and timely financial reporting.

* Created custom fields on all the forms that touch the sales process to tie them all together with a single piece of data
* Download reports from bank and reformat to process specification to import into NetSuite
* Created custom reports that would use custom fields to match payment amounts
* against bank data
* Checking and fixing discrepancies
* Customization of financial statements to reflect multiple business units financial activity
* UAT documentation and Testing
* Customer training and support
* User Training
* Created user manuals for sales reps explaining different processes like creating a Sales Order, Cash Sale, Support Cases and RMA process. Provided level two support to troubleshoot issues with billing and fulfillment. Also conducted new client training for various stakeholders in the company

**Client: Pro Translating, LLP. Miami, FL**

Operations Process Implementation

Company’s daily operation involves various business processes. These processes had to be implemented in NetSuite such that its two separate business units had separate processes that did not interfere with each other. Each business unit was being run as a separate entity from an operations stand point. However, the accounting and financial reporting needed to be centralized.

* Daily billing process by Cash Sale, Invoice and Departments
* Daily fulfillment process by channel (online, retail and call center)
* Customer support process
* Return Merchandize Process
* Dashboard KPIs (custom published dashboards based on roles) Creative use of NetSuite reports, searches and custom fields where necessary to tweak the processes to achieve the desired business result. Most recently, I completed a project involving commission module for a growing company with 25 sales people.
* Marketing Campaigns

Companies need to come up with various marketing campaigns to increase the sale or to retain customer loyalty. I have created many gift certificate programs and promotion codes for special occasions. There where many variations of promotion rules to meet the business objective at hand.

**Reporting:** Company needed many reports to measure key metrics of the operations. NetSuite offers many standard reports but each company has its own specific needs and a standard report can only go so far. NetSuite’s flexibility to add custom fields and make them appear on reports makes reporting a fun and creative activity.

Created various marketing reports to conduct customer data mining. Created different kinds of reports for Customers, Sales, Vendors, Sales Orders, Financial, Inventory, Order Management, A/R and A/P.

**NetSuite Back Office Administrator, OmPay LLC, Philadelphia PA July ‘11- Sep ‘13**

Ompay is a small Philadelphia company where I played multiple roles to assist in both accounting (AR/AP management) and customer support using NetSuite ERP/CRM

**Accounting Role**

* Management of customer and vendor records and accounts
* Daily receiving of Vendor POs and creating vendor bills
* Managing AP aging report and scheduling payments to vendors according to terms
* Managing AR aging report and following up with customers to collect payments
* Collected payments within NetSuite via integrated ACH and Credit Card service
* Created Journal Entries to record expenses correctly

**Monthly Reconciliation**

Ran monthly and quarterly book closing reconciliation process to reconcile credit card and bank statements to transactions in NetSuite

* Doing make deposit function from undeposited accounts to the correct credit card and bank accounts
* Accepted customer payments on open invoices
* Imported credit card transactions into NetSuite and downloaded bank statement to run reconciliation
* Audited revenue margins to ensure revenue from each channel was in the correct margin range

**Reporting and Searches**

Ran reports and saved searches to help manage the business

* Create scheduled reports using saved searches to send reports to partners
* Created audit reports to do 2 way match of sales orders against vendor POs
* Added custom fields to track which customer recycle our product and to track sending of marketing material to resellers. These fields were used to create custom reports
* Created dashboard alerts to track orders with incorrect shipping to it could be corrected before fulfillment
* Customize dashboard to show KPIs and trend graphs to track revenue performance and support cases

**Data Migration**

As the NetSuite back office administrator, I have migrated entire companies data from one NetSuite account to the other and also from a non-NetSuite system into NetSuite. Migration of an entire companies ERP/CRM system is a major project. The process was as follows:

* Business objective definition
* Business process definition
* NetSuite process architecture
* Enabling the necessary features
* Creating Chart of Accounts
* NetSuite customization lists
* NetSuite preparation (customization of forms)
* Department creation
* User roles creation
* Web store creation
* Test run of migration with limited data
* Approval of successful test run
* Full migration
* Test & Approval
* User training

**Restaurant Consultant/ Corporate Trainer. Ihop Corporation, Philadelphia PA *Sep ‘05 - July ‘11***

**Clients**: Maritas Cantina, Harvest Drive Restaurant, Palace of Asia, Palace At The Ben & Ihop Restaurants

* Used creative marketing tactics based on the season such as partnership approaches with bus associations and theater venues to drive business to the restaurant
* Extensive profit/loss experience in standardization of portions and implementation of labor cost controls, documented end-of-month, daily and weekly transactions, account reconciliation and prepared bi-weekly payroll.
* Developed advertising strategies, layout, and design for print in Lancaster Newspaper and Amish Newspaper and provided complimentary meals to Bus Service (people in charge of the buses) in exchange for promotions.
* Analyzed monthly reports and PNL to maintain strict food, beverage and labor cost controls. Reduced labor cost from last year by 15%, beverage cost by 6% and food cost by 3%.
* Handled purchasing and receiving (25 vendors). Streamlined our purchasing procedures in terms of quantity, quality and timing for efficient operations.
* Developed customer base through face-to face communication, e-mail campaigns, bonus programs and buying methods. Created a Preferred Guest Program for repeat customers.

**Sales Manager, Apex Marketing & Promotion, Inc, Upper Darby. PA**  ***Feb 02- Aug 05***

* Sold office equipments and supplies to high volume commercial clients across the tri state area.
* Developed and presented 50+ media presentations to prospects resulting in 55 new accounts totaling $300,000 in revenues."
* Maintained great relations with existing customers and personally attending to all their needs and issues
* Teaching up selling to existing and new team members.
* Training new sales representatives in the field and breaking them out of their comfort zone.
* Recipient of the sales manager of the month several times in 2004 and sales person of the year award in 2003.