

Project Managed

- Laserfiche Document workflows - 2013 to 2021
 - [Created and maintained workflows](#)
 - These workflows allowed for the processing of internal company documents to be processed and stored electronically
- Assisted with the setup and implementation of Sales Management Software
 - Once in 2010
 - Once in 2020
- Worked with the company's Operating Software company to learn how to create and setup a consolidated invoice for customers with multiple accounts
 - This allowed the company to move from using a manual spreadsheet template printed on plain stock letterhead to using the Operating Software
 - This also allowed the company to move from manually emailing the invoices from someone's desktop to the customers with emailed invoicing to having the system email out the invoice
- Assisted with setup and implementation of Freshdesk ticketing platform for Administrative and Customer Care teams - [2020](#)
 - This allowed the department to use a dashboard-style system instead of having multiple people sharing the same Outlook inbox
 - Reporting on such transactions has been a powerful tool for the company
- Assisted Marketing Assistant with creating Card Order Request form on the company website - 2017
 - Card Order for Access Cards used for card readers
 - This allowed the customer to have a more user friendly request process while the company received the specific information needed to process the order
 - Previously the internal process for the company was time consuming due to lack of information to process the order request
 - Once a form was created for the customer to fill out and submit, the internal process for the orders improved
- Created 9 company SOP's - 2017 to 2020
- Created final invoicing process to be billed in invoicing platform - 2018
 - Final invoices for customers that have canceled or were canceled due to non-payment
 - Invoices were previously created on a spreadsheet template and tracked manually in a master spreadsheet list
 - The new process was created so these invoices could be generated and tracked in the invoicing platform
- Redesigned [company invoice](#) format to be more user-friendly - 2020
- Created process in the invoicing system to provide customers with a military discount when applicable - 2017
- Converted various company forms from Word and Excel to [writable pdf files](#) - 2009 to 2021
 - Also, redesigned several company forms

- Created new billing branch - 2021
 - Created the various billing codes - installation, service, and recurring services
 - Created the various General Ledger account numbers
 - Converted existing customers from old branch to the new branch
- Created paperless Sales Work Order process - 2015
 - This allowed the company to increase the turnaround time on processing due to removing the need to have hard copy documents/file as part of the workflow
 - The entire workflow moved to be processed electronically
- Assisted with setup and implementation of eSignature for customer agreements via DocuSign - 2020
 - This allowed the company to increase the turnaround time on processing sales work orders due to no need to wait for the hard copy paperwork to be mailed in or dropped off
- Created and maintained Administrative and Customer Care [career path levels](#) - 2018
 - Created training checklists as part of the levels program
 - This allowed those within the department to have a path to work towards while developing themselves professionally at the company
- Researched LMS platforms and began creating a Help Doc site for department manuals - October 2021
- Self-taught [Trello](#) and built out department boards, including automations
- Researched and presented various time clock platform options for Housekeepers at a startup cleaning company
- Researched and self-taught the payroll feature of the invoicing system for a startup cleaning company
- Created an [employee handbook](#) for a startup cleaning company
- Created a [service flyer](#) for a startup cleaning company
- Created [client surveys](#) for a startup cleaning company