

**VERABANK
JOB DESCRIPTION**

JOB TITLE: Salesforce Administrator

DEPARTMENT: Information Services

INCUMBENT: _____

SUPERVISOR: Information Services Project Manager

FLSA STATUS: Exempt

DATE: Jan 4, 2023

JOB PURPOSE

Responsible for providing high-level, specialized expertise and administration on the Bank's Salesforce platform including: our lending platform(nCino), Salesforce CRM, and wealth management platform (WealthHub). The candidate will be responsible for managing ongoing system enhancements and support for employees.

DUTIES AND RESPONSIBILITIES

1. Salesforce configuration changes, including (but not limited to): Workflow, Process Builder, Flow, assignment rules, approval processes, fields, page layouts, record types, dynamic layouts, apps, actions, custom settings, dashboards, and reports
2. Administer Salesforce CRM on a day-to-day basis
3. Sandbox environment management
4. Identify and gather requirements, focusing on the gold standard as a best practice, scalable solutions with a focus on exceptional user experience
5. Analyze business requirements, procedures and problems and serve as a technical solution strategist
6. Develop reports, custom report types, dashboards and processes to continuously monitor data quality and integrity
7. Identify unused or underutilized platform features that can raise the bar for the business and platform
8. Manage operational requests such as creating rules around workflow, validation, fields, advanced formulas, custom objects, flows, etc.
9. Assist in creating documentation of processes, policies, application configurations and continual modifications and help related materials
10. Assist with the communication of any platform changes to our Salesforce Support Engineer & Trainer
11. Collaborate with third-party vendors for custom development projects
12. Proactive system maintenance including Security Reviews, Release Updates, Health Check, and Optimizer

13. Assist management with vetting, selecting, and implementing new Salesforce-related technology solutions
14. Provide technical support and troubleshooting assistance to users in the field
15. Monitor queues and resolve escalated support tickets being created
16. Attend webinars, training, and conferences to maintain a full understanding of the capabilities and functionality of all applications we use within Salesforce.
17. Maintain compliance with regulation and bank policies.
18. Develop quality control metrics and communicate deficiencies to management
19. All other duties as assigned

CONTACTS

Daily contact with supervisor, co-workers, other bank departments and managers. Frequent contact with nCino support and sales.

SPECIFIC REQUIREMENTS

1. Bachelor's Degree
2. Strong technical aptitude, and an understanding of basic computer information systems
3. Ability to work independently and as a team with excellent time management skills

PREFERRED REQUIREMENTS

1. Previous experience as a Salesforce Administrator
2. Experience in technical support or Helpdesk environments

PHYSICAL REQUIREMENTS

Office setting with moderately varied desk-oriented activity, with fatigue being relieved by opportunities to stand and move around in a comfortable environment. Repetitive movement of fingers, wrist and hand.

NOTICE

1. This job description in no way states or implies that these are the only tasks to be performed by the incumbent occupying this position. The incumbent will be required to follow any other instructions and to perform any other job-related duties.
2. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. To perform in this position successfully, the incumbent will possess the abilities and aptitudes to perform each task proficiently.
3. Ability means to possess and apply both knowledge and skill.
4. This position description has excluded the marginal or peripheral functions that are incidental to the performance of primary functions. All requirements are essential to the function of the position.
5. This job description describes the minimum selection requirements to qualify for the position. However, promotion and other employment decisions are also based on Bank needs, being in good standing, fully competent performance, and other non-discriminatory issues.
6. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
7. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.

8. This position description does not create an employment contract, implied or otherwise, other than an “at will” employment relationship.

Employee

Department/Division Manager

Date

Date