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| --- | --- | --- | --- |
| Job Title: | Office Assistant - Billing | Status: | Non-Exempt |
| Department/Group: | Administration | Travel Required: | No |
| Position Reports to: | Office Manager | Position Type: | Full-Time |
| Salaried / Hourly: | Hourly |  |  |
| Reporting Positions: |  | | |
|  |  |  |  |
| **Approved By:** |  | **Date:** |  |
| **Updated By:** |  | **Date:** |  |

**Position Summary / Purpose**

Provide support to management in the form of orchestration of administrative functions.

Help retain customers by exceeding their expectations through follow up contact with them and through the accurate transcription of customer information.

**Principle Duties and Responsibilities**

* Answer phones and handle incoming calls
* Type and process estimates and business correspondence
* Create invoices
* Schedule work
* Perform customer billing
* Track customer and sales data
* Perform job costing
* Assist with lower level bookkeeping activities (enter invoices, send statements)
* Complete inner-office documentation

**Additional Duties and Responsibilities**

* Assist in assembling marketing and presentation materials
* Update project notes
* File records

**Decision Rights and Authority**

* Prepare invoice documents based on documentation provided

**Working Relationships and Scope**

* Maintain timely communication and flow of information with technicians, service providers, estimators and project managers

**Performance Competencies**

* Oral Communication – Speaks clearly and persuasively in positive or negative situations. Able to effectively calm excited customers, use questioning to accurately identify the type and extent of problem and describe the steps that will be taken. Adaptable and able to think on their feet.
* Written Communication – Writes clear, precise, well-organized letters, proposals, and emails. The individual edits work for spelling and grammar and is able to read and interpret written information. Uses appropriate vocabulary and grammar.
* Planning & Organizing – Plans, organizes, and schedules their time in an efficient and productive manner. Focuses on key priorities. Effectively manages multiple tasks simultaneously. Pays attention to details.
* Process Orientation – Approaches tasks with an understanding of the overall set of steps involved in completing the work. Awareness of what is required for them to complete their job and what others require. Has a continuous improvement mindset – is always thinking about ways to improve and streamline business processes.
* Technology – Regularly uses standard word processing, spreadsheet and presentation software tools to enhance efficiency and accuracy of work performed. Proficient at using company approved software applications for bookkeeping, customer information and job notes.

**Qualifications - Knowledge, Skills and Abilities**

* Education and Experience

High school (or GED) diploma plus a minimum of three (3) to five (5) years of office or bookkeeping experience.

* Bookkeeping and Accounting

Basic understanding of bookkeeping and cash flow. Experience using bookkeeping software such as QuickBooks, Peachtree, Great Plains, etc. to perform invoicing and job costing.

* Mathematical skills

Adequate math skills. Ability to compute ratios and percentages and to interpret financial reports and analyze performance against business plans and industry benchmarks.

* Computer skills

Demonstrates intermediate proficiency in the use of computers and computer software, especially MS Office, Word and Excel. Ability to learn and use enterprise software applications for tracking customer information, posting job notes, scheduling work and calculating job profitability.

* Certificates, Licenses and Registrations

None required for this position

**Physical Demands**

*The physical demands described below are representative of those that must be met to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the employee is regularly required to sit, use hands to finger, handle or feel, reach with hands and arms, and talk or hear. The employee is frequently required to stand and walk. The employee must regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.

**Working Conditions**

* The work of this position is predominantly carried out in an office environment. Daily exposure to the shop where vehicles and equipment are housed and maintained is expected.
* Noise level in the work environment is usually quiet.

**EMPLOYEE POSITION ACKNOWLEDGMENT**

I have read and understand the duties and responsibilities of my position as Office Assistant - Billing.

I have been provided with a copy of the company’s Position Description for this job.

I understand that I am responsible for carrying out the responsibilities defined in the attached Position Description and am expected to follow any additional job-related instructions, and to perform additional job-related duties as requested by my supervisor.

**SIGNATURES OF ACCEPTANCE**

|  |  |  |  |
| --- | --- | --- | --- |
| Signing on behalf of this position and agreeing to accept all its accountabilities is: | | | |
|  | Date |  |
| Signing on behalf of the Manager’s position and agreeing to accept all its accountabilities is: | | | |
|  | Date |  |