

Title: **ACCOUNTING & DATA ENTRY COORDINATOR**

Reports Directly To: Director of Finance

Classification: **Exempt**



JOB DESCRIPTION

Process data for accounts receivable and provided phone customer service.

ESSENTIAL FUNCTIONS

- Provide exceptional customer service to sponsors, school bookkeepers and parents with questions related to their clubs.
- Answer phone calls promptly and return voice mail messages the same day.
- Process credit card transaction over the phone.
- Email invoices to sponsor / bookkeeper as requested.
- Process phone orders for merchandise, membership and convention orders.
- Provide general phone and email customer service related to the sponsor portals on shield.
 - Name corrections to students
 - Reprint certificates
 - Resetting invoices.
 - Deleting duplicate invoices.
- Purchase Order creation and entry following receiving counts preformed by warehouse staff.
- Adjust inventory for intercompany production and department usage.
- Data entry as assigned by supervisor.
- Notifies Director of Finance immediately of discrepancies between monies due and monies received.
- Posts NSF checks to customers accounts.
- Contacts schools promptly that submit incorrect check amounts.

KNOWLEDGE, SKILL AND/OR ABILITY (KSA'S) REQUIRED TO BE SUCESSFUL WITHIN THE ORGANIZATION

- Ability to handle large number of calls during peak convention season and an average volume throughout the year.
- Have a positive, friendly and service oriented demeanor when dealing with sponsors, parents and school bookkeepers.
- Ability to handle complaints and difficult customers.
- Must be detail oriented and possess the ability to work on repetitive projects with few errors.
- Must be able to interact professionally with all departments within Beta

EDUCATION, TRAINING AND EXPERIENCE

- Bachelor's degree preferred.

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- Knowledge of MS Dynamics Great Plains preferred.
- Use of Microsoft Products including MS Word and MS Excel
- Customer service and switchboard experience helpful.
- Basic knowledge of The National Beta Club
- Professional Development as the CEO or Director Finance deems necessary
- Maintains prompt and regular attendance while following policies and procedures
- May require some lifting, moving/packing of materials and long periods of standing and/or sitting.
- Stays focused and on task with disregard to regular interruptions.
- Travel may be required

This job description has been approved by all levels of management

Supervisor _____ HR _____

CEO _____

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____