

Position: Billing Clerk



Position Classification: Full time- Hourly/ Non- Exempt

Position Reports to: Accounting Manager

Position Supervises: None

Position Summary

The Billing Clerk is responsible for assisting in the company's accounts receivable functions including invoice processing and administrative duties within the accounting department. The individual in this role serves as a point of contact for inquiries related to customers.

Responsibilities

Duties include but are not limited to the following:

Essential function(s)

The Billing Clerk will play an integral role in the success of the Accounting team. Specifically, s/he will be responsible for:

- Organizing the billing packets received daily to distinguish between customers billed on a per sales order, weekly, bi-weekly, and monthly basis.
- Generating customer invoices in a timely manner from billing packets.
- Reviewing completed billing for accuracy.
- Sending completed invoices to customers
- Serving as a point of contact for internal and external parties inquiring about invoices.
- Responding to customer requests and questions via telephone and email.
- Accepting, processing, and recording credit card payments.
- Processing check deposits daily with the bank and posting in the accounting system.
- Conducting account research and analysis, as necessary.
- Updating current customer pricing and notes within the accounting system
- Reviewing project logs monthly to ensure all billing for the month is complete.
- Acting as custodian for the physical files of the accounting department
- Protecting Ingenium by keeping information confidential.
- Completing credit reference requests for customers
- Sorting daily mail

- Completing data entry projects, as needed
- Other duties as assigned by supervisor

Non-Essential function(s)

- Assist Accounting staff when needed

Qualifications and Experience

- Ability to work independently using good judgement, and as a team player.
- Excellent communication skills including written, verbal, listening, and customer service skills with the ability to effectively communicate with and work well with others in order to manage projects, etc.
- Must possess strong analytical abilities
- Must exude professionalism.
- Pleasant telephone manner with an upbeat and friendly demeanor.
- Exceptional organizational skills with a high consideration to detail and accuracy.
- Resourceful, self-motivated with a sense of urgency and strong work ethic.
- Adept at time management.
- Able to work with finite deadlines.
- Trustworthy, honest, respectful, and flexible.
- A desire to learn and advance in a fast-paced environment.
- Must be able to be entrusted with confidential information.
- Proficient computer skills working with various office equipment, computers and various programs including Excel, Word, Outlook, QuickBooks etc. and the ability to effectively work on spreadsheets, word processing, networking and email programs.
- Authorized to work in the United States for any employer.
- Escondido, CA preferred with ability to work in a telecommuting environment while remaining productive and effective.

Core Competencies

Time Management

Successful Billing Clerks use time to their advantage. They schedule specific times to complete tasks, avoid procrastinating, prioritize their tasks in line with department deadlines and goals, start their most difficult tasks first thing in the morning, follow up on requests, and use downtime for planning and preparation. They break up projects into specific action steps and keep the process moving. They keep organized records for quick reference when completing tasks. Accounts Receivable Clerks understand their tasks, why they are performed, and how they fit into the big picture. They recognize that if something doesn't seem right, it probably isn't, and they seek an explanation before completing their work. Understanding the big picture will help them to prioritize and ask for help when necessary instead of spending time caught up in unnecessary details.

Communication

Billing Clerks have strong communication skills. They provide regular updates to their managers and communicate the status of their workload to both managers and coworkers, especially during month-end and year-end closes. If they discover an issue, they ask for help when necessary and present potential solutions

while discussing with their manager. They have strong verbal and written communication skills and are adept in knowing which form of communication should be used in each situation. They interact well with vendors and internal personnel and provide a high level of service.

Teamwork

The accounting department works together daily to complete projects and meet deadlines, which makes teamwork imperative. Billing Clerks make their manager's priorities their priorities and gain a reputation for taking extra steps even for small tasks and provide solutions rather than creating different problems. They assume that their manager is always pressed for time and has deadline to meet. They communicate what their planned priorities are but offer to help with more pressing matters if necessary. This flexibility and willingness to help wherever needed helps ensure that the department's goals and deadlines are met.

Problem Solving/ Analysis

A successful Billing Clerk must have the ability to identify issues that arise and use the tools available to him or her to work through them, if possible. The key to this is understanding how much time to work through an issue independently before bringing it to another manager of the team or a supervisor.

Education and Certifications

- Associate degree preferred but not required.

Physical Demands

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

- Most work is performed in a temperature-controlled office environment.
- While performing the duties of this job, the employee is required to walk 10% of the time, stand 10% of the time and sit 80% of the time.
- The employee will occasionally lift and or carry up to 25 lbs.
- Employee may use computer, phone, copier, and other office equipment in the course of a day.
- While performing the duties of this job, the employee is occasionally required to use hand to finger, handle or feel objects, touch and use tools, reach with hands and arms, climb stairs, bend, stoop, twist, lift, reach, push, pull, grasp, balance, kneel, crouch, crawl, grasp, talk, hear, and walk during the course of employment.
- Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and an ability to adjust focus.
- Employee may be required to travel for business purposes.

Environment

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential function of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing this job, the employee is

exposed to weather conditions prevalent at the time. This may include warm, hot, or cold temperatures. The noise level in the work environment is moderate.

Work Schedule

As a non-exempt hourly employee, the employee shall work a designated schedule as assigned by management. Employee shall not work over 8 hours per day or 40 hours per week without prior authorization from management but if so, will earn overtime for any work performed in excess of 8 hours per day or 40 hours per week. Employee must also follow company's policies regarding required meal breaks.

Acknowledgement for Receipt of

Job Description

I have received a copy of this Job Description and have read and understand its contents. I understand that if I have any questions pertaining to this job description or my overall job duties, I will consult my supervisor immediately. Furthermore, based on business demands, I understand that the company may revise my duties at its discretion.

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Employee Information

Employees Name:

Employee Signature:

Date:

Supervisor Information

Supervisors Name:

Supervisors Signature:

Date: