



# CREDIT ASSISTANT

<b>Department:</b> Office/Credit	<b>Reports To:</b> Credit Manager
<b>Location:</b> Lakeland	<b>Revised:</b> May 2024

## JOB SUMMARY:

This position provides support to the Credit Manager. Credit and Collections are an integral part of the company and critical to the success of Barney's Pumps. Credit Assistant responsibilities include data entry, assisting customers with account changes, collection calls, filing notice to owners, pulling credit reports, research and other duties as determined by the Credit Manager. The Credit Assistant also serves as a back up to the Receptionist.

## ESSENTIAL FUNCTIONS:

- Assist Credit Manager in everyday activities including collection calls/ emails.
- Contact & document all delinquent accounts and request payment to bring the account current.
- Process payments (credit cards, checks, ACH & wire payments).
- Maintain established Progress Payment Schedules for larger projects.
- Pull credit reports for Credit Manager to review for new applications or existing customers.
- Maintaining and updating credit files.
- Set up new customer accounts in P21.
- Manage/ update customer account information in P21, including adjusting credit lines.
- Prepare all Notice To Owners, to include verifying order and sales tax amounts.
- Assist Credit Manager with lien releases and start up approvals.
- Review invoices for accuracy prior to mailing/emailing/submitting via portals to customers. Locate any missing paperwork & maintain customer files.
- Maintain tax-exempt certificate information in P21.
- Assist with year-end tax exemption mailer and update.
- Assist customers on the phone (address changes, requests for invoice copies, etc.).
- Maintain our information on customer portals.
- Serve as backup to Credit Manager in areas assigned.
- Working knowledge of order entry in P21.
- Any other day to day matters for the department.

## EDUCATION:

- High School Diploma or Equivalent.

## WORK EXPERIENCE:

- Construction accounting background.
- Administrative experience required.
- Knowledgeable in application of Florida Lien Law, including Notice To Owner, lien releases, claim of lien, and notice of nonpayment.
- Knowledge of Florida Sales Tax & Tax Exempt Requirements.
- P21 Knowledge helpful but not required.

## SKILLS AND ABILITIES:

- Excellent verbal and written communication skills.
- Ability to organize and prioritize your workload with multiple concurrent projects.
- Must possess keen eye for detail.



## CREDIT ASSISTANT

- Strong team player which is highly motivated, self-starter capable of working without constant supervision.
- Strong Microsoft Office Products (Word, Excel, Outlook, etc.) Skills.

### OTHER:

- Company Sponsored Health Care.
- 401(k) and Company Match.
- PTO

**Barney's Pumps is a drug free workplace. All job offers are contingent on passing a drug test, a physical, and a background check.**

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date