

## Primary Relationships

**Internal:** Reports to President

**Team:** Sales & Service

**External:** Existing Clients

## Summary

The Office Administrator is responsible for overall general office duties, a backup for the Tech calls and dispatch. They will maintain and setup client agreements in ConnectWise and invoice customers for product, time and agreements. The Admin will maintain a sufficient product inventory, quote and purchase product for clients and basic accounts payable and receivables. They will assist in new employee recruiting and provide Human Resources duties.

## Key Performance Indicators

1. Job knowledge and work quality
2. Attitude and initiative
3. Punctuality
4. Timeliness in A/R and A/P processing
5. Accuracy and timeliness in purchasing and billing
6. Follow through and timely accomplishment of tasks and duties
7. Timely invoicing as established in the guidelines

## Projected Time Allocation

- 25% Purchasing
- 20% Bookkeeping
- 15% General Office Tasks
- 15% Invoicing
- 10% Misc Tasks Assigned by Management
- 10% Recruiting
- 5% Human Resources

## Duties and Responsibilities

### Purchasing

- Work with Sales and/or Service Depts. regarding the customer's request
- Contact customer to discuss who and how this product will be used
- Research our vendors for the best price
- Generate a quote and submit to the customer for approval

- Once approved, purchase the product, advise the customer of the estimated delivery date (with a notification to the technician)
- Setup a ticket on the Purchasing board in ConnectWise
- Check in product once it is received and send notice to Service Dept. for installation
- Purchase and maintain proper level of inventory

### **Bookkeeping**

- Receive customer payments. Confirm correct amount has been paid
- Receive invoices from vendors and confirm amounts are correct
- Generate spreadsheet listing check and bills. Deliver to CPA for processing
- Review A/R weekly and send payments reminders to customers who have exceeded their payment terms
- Enter reminder information on the A/R board in ConnectWise
- Work with CPA on maintaining Asset List
- Reconcile petty cash

### **General Office Duties**

- Filing
- Backup on the phones when the techs are busy
- Receive and open mail
- Order office supplies
- Setup and maintain new customers in ConnectWise
- Setup and maintain new agreements for our customers
- Send weekly reminders of the following weeks sysguards

### **Invoicing**

- Check time records on the invoices that are going to be generated
- For customers who are under the TotalOffice Agreements, check the configurations to be sure we are billing for the correct number of units
- Invoice monthly agreements on the 1st of the month
- Invoice time and material customers weekly
- Invoice customers for products they have purchased at the time of the purchase
- Download invoices into Quickbooks weekly

### **Misc Tasks Assigned by Management**

- From time to time the Office Administrator will be assigned project by the President, Sales Manager or Service Manager.
- Be able to work in both a team setting and independently in order to complete the assignment

### **Recruiting**

- Maintain a calendar of area job fairs
- Attend various Career Job Fairs
- Provide the initial phone interview for potential new hires

### Human Resources

- Have all required New Hire forms completed
- Submit information for credit and criminal background checks
- Advise our drug testing vendor of needed test
- Advise CPA of any new hires for payroll
- If a technician has been hired, check out their tool kit to them, phone and laptop if needed
- Explain insurance and IRA benefits. Have employee complete appropriate forms and submit to vendors.
- If employee leaves, be sure all items that were checked out to them has been turned in

### Supervisory Responsibilities

This position does not have any supervisory responsibilities, but the individual is expected to be a good team player and responsibly delivers results that benefit our Customers and myIT.com.

### Competencies

To perform this job successfully, an individual should demonstrate the following competencies:

- **Business Ethics** — Treats people with respect; keeps commitments; inspires the trust of others; works with integrity and ethics; upholds organizational values
- **Initiative** — Search out new tasks and expand abilities professionally and personally
- **Teamwork** — Balances team and individual responsibilities; exhibits objectivity and openness to others' view; gives and welcomes feedback; contributes to building a positive team spirit
- **Problem Solving** — Identifies problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; resolves problems in early stages; works well in group problem solving situations
- **Customer Service** — Provide our customers with the best possible service to meet their needs
- **Written Communication** — Writes clearly and informatively; edits work
- **Oral Communication** — Speaks clearly; listens and gets clarification; responds well to questions

### Skills and Qualifications

- Four (4) year degree or greater
- Two (2) years of customer service experience
- Two (2) years of accounts receivable experience
- Two (2) years of sales support experience
- Excellent organizational skills
- Excellent verbal and written communication skills
- Experience in scoping and managing projects through completion

### Physical Demands

The physical demands for an employee to successfully perform the essential functions of this job are described below. 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 talk or hear. The employee is frequently required to stand; walk; sit; use hands and fingers to handle or feel, and reach with hands and arms. The employee must occasionally lift and/or move up to 50 pounds.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

**Work Environment**

The work environment for an employee to successfully perform the essential functions of this job is described below. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the service team work environment is usually moderate. Travel to and from customer sites is common. Each customer's work environment varies based on the type of business they operate.

**Intent and Function of Job Descriptions**

Job descriptions assist our company in making certain our hiring process is fairly administered and qualified employees are selected. We view job descriptions as essential to our performance appraisal system and related promotion, transfer, layoff, and termination decisions. Well-written and maintained job descriptions are also an integral part of our compensation system.

All job descriptions are reviewed to ensure only essential functions and basic duties have been included. Requirements, skills, and abilities included have been determined to be the minimal standards necessary to successfully perform the job whereas peripheral activities that are only incidentally related to the job have been excluded.

In no instance should the requirement, skills, and abilities be interpreted as all-inclusive.

Supervisors may assign additional appropriate activities and requirements. It is possible requirements may be modified to reasonably accommodate disabled individuals in accordance with the Americans with Disabilities Act. At no time will accommodations be purposefully made which may pose serious health or safety risks to the employee or others, or which impose undue hardships on our company.

Job descriptions are not intended as and do not create employment contracts. Our company is an at-will employer. At any time employees can be terminated for any reason not prohibited by law.

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Employee Signature

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Date

\_\_\_\_\_  
myIT.com Signature

\_\_\_\_\_  
Date