

# Credit Assistant Job Description



**Area:** Credit

**FLSA Status:** Non-Exempt

**Reports to:** Assistant Controller

**Supervisory Responsibility:** None

**Date of Job Description Revision:** February 2023

## Primary Role:

Provides support services to the Assistant Controller and Credit Analysts to assist them in establish creditworthiness of customers.

## Responsibilities:

- Model the Pacesetter Way in daily job activities.
- Performs variety of accounting tasks requiring quick resolution of issues, allowing Credit Analysts to perform their tasks in a timelier manner.
- Verifies, posts, and processes payments including live checks, electronic, credit card, and prepares bank deposits (only if system down and cannot do remote deposit).
- Keeps Accounts Receivable calculations and records maintained, including cash receipts, and related items.
- Researches unapplied payments, collects on accounts, and notifies delinquent customers by phone, mail, or email to collect payments for past due balances.
- Approves and processes customer refund check requests up to a certain dollar amount.
- Checks credit references for new credit applications, denies or approves credit applications up to a predetermined credit limit, files and maintains credit applications and auto pay forms, and verifies credit card settlements.
- Reviews correspondence for follow-up on unresolved items and forwards them to the appropriate departments.

## Skills/Education Required:

- High School Diploma or equivalent education required.
- Strong customer service orientation with a courteous, professional and energetic attitude to cultivate relationships.
- Proficient in Microsoft Suite (Word, Excel, PowerPoint, Outlook) and other computer software.
- Ability to handle several urgent matters simultaneously.
- Ability to be remain postured and professional under pressure.
- Ability to maintain discretion and a dedication to protecting the financial privacy of customers.
- Advanced mathematical skills.

I understand and agree to perform the responsibilities listed above:

\_\_\_\_\_  
Associate Signature

\_\_\_\_\_  
Date