

Holmes Agro - Key Job Elements and Standards of Performance

Incumbent:	Position: Accounting and Customer Service Administrator
Location: Stayner	Supervisor:
KEY JOB ELEMENT	STANDARD OF PERFORMANCE
Customer Relations and Transactions	- Support the customer service team to exceed an annual net promoter score objective - Decrease or maintain a low level of customer service complaints - Assist customers in an orderly and efficient manner with regards to sales and service (counter, telephone, email, etc.) to create an excellent customer experience - Exhibit a friendly, courteous, and professional attitude with customers while focusing on meeting and exceeding our customers' expectations - Direct customers to appropriate personnel - Be knowledgeable about Holmes Agro's product and service portfolio - Process payments, invoices, delivery invoices - Assist in scheduling pick-ups, deliveries & custom application, and account queries - Process loadout tickets and invoices for customer orders effectively, efficiently, and accurately - Ensure adherence to the credit policy and credit limits - Process customer payments regularly (from mail, online, walk-ins, etc.) - Respond to account queries, and questions regarding payments, loadouts, invoices - Prepare paperwork required for shipments - loadouts, invoices, maps
Customer Billing	- Process accurate and efficient receivables based on source documentation (loadout tickets, invoices, work orders, lab reports, etc.) ensuring compliance with established procedures. - Verify that all products and services have been captured prior to billing. - Follow-up with appropriate staff in a timely manner to ensure accurate records of source documents, inventory and pricing confirmations
Customer Monthly Statements	- Prepare monthly AR statements in accordance with established procedures by the 5th of following month. - Ensure pricing, inventory and transaction accuracy prior to fiscal close off. - Send statements and invoices by mail and email along with newsletters
Accounts Payable	- Match inventory invoices and bills of lading (check quantity & price) - Verify payable invoices (check for correct G/L code) - Prepare & enter expense invoices for payment - Assist Accounts Payable clerk in Orangeville to ensure suppliers invoices are processed and paid in a timely manner

Incumbent:	Position: Accounting and Customer Service Administrator
Location: Stayner	Supervisor:
KEY JOB ELEMENT	STANDARD OF PERFORMANCE
Process Customer & Miscellaneous Payments	- Close point of sale on a regular basis (daily during busy season) - Balance payments to cash receipts summary from Accounting System - Forward cheques and point of sale summary to Orangeville monthly - Complete bank deposits - Complete night deposit if set up - Support Third Party Financing - FCC& Scotiabank - Monthly disbursements & payments as required.
Inventory Control	- Use product release #'s or Issue P.O.'s for inventory - Schedule incoming material deliveries - Communicate with other locations regarding incoming products & deliveries if necessary - Enter inventory received as per B/L accurately - Communicate with plant staff - orders & deliveries - Schedule and lead regular inventory counts and reconciliation
Lawn and Garden	- Oversee lawn and garden sales and service - Maintain lawn and garden inventory
Assist manager and agronomy staff in duties	- Organize ordering and delivery of materials - Prepare purchase orders - Prepare price lists, organization of customer information and input into Myfarm program - Prepare work orders - Special projects - sales reports, soil samples, etc. - Prepare soil, manure, water and tissue samples to send to lab for testing as required
General Office Duties	- Prepare mail (incoming & outgoing) & courier pick-ups - Manage filing and data entry - Order office supplies and promotional items as required - Maintain Office equipment as needed (printer, point of sale, telephones, etc.) - Work within a budget on Expense and have management approval on additional expenses - Assist with general housekeeping – in and around office and plant, dispose of old info (chemical brochures, newspapers, etc.) as required
Other Duties as Assigned	- Assist supervisors and managers in additional tasks, meetings and projects to further develop our business and strengthen our culture