



## Summary of Position

This person will be responsible for the sales order entry process, including the management of client orders from order entry through invoicing. Coordinates project timelines and status reports to assist in a team environment. Delivers consistent and constant vendor communications to provide timely and accurate project updates, both internal and external.

## Job Responsibilities/Duties

- Assist Account Manager/Account Executive/Project Coordinators with proposal and product specification support.
- Professional, timely, accurate communication throughout the Sales Order Process, both internal and external.
- Coordination and follow up of order entry, order management, vendor interface/acknowledgements, team updates and order close-out.
- Provide up to date projected installation dates and information through communication with the team. Providing finance accurate information for company projections and goals.
- Maintaining Gross Profit Margin by keeping tabs of GP and margin erosion.
- Assist AM/AE/PC with the preparation of project proposals.
- Review and proof order for basic information accuracy and completeness using **elements** Order Checklist.
- Enters orders into business system, submits Purchase Orders to Sub Contractors for labor and to Vendors for product.
- Interface with factories in a timely manner on order status, pricing, current lead times, reservation of manufacturing for pending orders and special requirements.
- Understand or seek to understand our business systems and vendor electronic interactions and their functions.
- Follow internal and vendor process and procedures to maintain the best possible project outcome.
- Communicate order information, delivery status and installation, to appropriate parties both internally and externally, including sub-contractors and vendors.
- Attend Team and Department Meetings.
- Be available for internal and external challenges and emergencies that may arise.
- Maintain electronic master sales order file ensuring accurate and complete job status reflected in current business system.
- Create Installation Packets for PM or Scheduler.
- Maintain communication of ship dates and arrivals with Team.
- Follow up with Installation Completion through to invoicing and order close out processes.
- Other duties as assigned



**This position is:** Non-Exempt/Full-time **Salary Range:** \$42,000-53,500 annually

**Experience/Requirements**

- Proficient in Microsoft Office; E-mail, Excel, Word.
- Communicative; able to communicate in a professional manner, both internally (team, department) and externally (vendors, reps, clients).
- Independent; flexible and capable of setting priorities pertaining to work loads.
- Organized; able to organize daily duties by multitasking, managing your time and communicating realistic expectations.
- Works well under pressure; able to work well under time constraints, project deadlines, heavy workloads, day-to-day challenges, and business demands. Asks for help.
- Efficient; able to develop a work style to create your most efficient work day.
- Gatekeeper; able to hold others accountable for their responsibilities of the process in order to maintain project structure and margins.
- Proactive; able to develop a work style that is consistent and pro-active in follow-up, tracking and monitoring projects from beginning to end.
- Team Player; values the importance of being a team player within the structures of your team, your department and our company.
- Adaptable; able to adapt to a multitude of different work styles and personalities.
- Responsible; able to take ownership in one's work as well as in seeking help for the best possible outcome for all tasks and duties. Finds things to do when things are not so busy.

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_