

CITY OF SAN JUAN CAPISTRANO

**CUSTOMER SERVICES REPRESENTATIVE**

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

**DEFINITION**

To perform a variety of customer service functions including greeting, screening and assisting City visitors; providing information and assistance in person or on the telephone pertaining to City policies and procedures; resolving customer and citizen complaints; receiving payments, issuing receipts, inputting data into the computer and performing related activities in assigned area; reconciling a cash drawer; and performing a variety of clerical functions related to assigned area of responsibility.

**SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the assigned higher level staff.

**ESSENTIAL FUNCTION STATEMENTS**—*Essential responsibilities and duties may include, but are not limited to, the following:*

**Essential Functions:**

1. Serve as receptionist for assigned area; receive and route telephone calls; respond to customer and citizen questions and complaints; take messages as appropriate.
2. Assist the public in person, on the telephone and via email; provide information on City policies and procedures; locate staff; direct visitors to scheduled meetings and appointments.
3. Receive and record payments of City revenue; collect monies and issue change; operate the cash register; balance and reconcile cash drawer and petty cash; issue receipts; prepare daily bank deposit; and input data into the computer.
4. Receive, sort and distribute incoming and outgoing mail; provide a variety of routine record keeping duties.
5. Assist other City staff, as needed, with the usage of centralized equipment including postage meter, mailing scale, fax machine, vending machines.
6. Maintain lobby and common areas in a clean and orderly fashion.
7. Maintain a variety of files and records; ensure information is current and accurate; research and retrieve files, as necessary.
8. Maintain a variety of printed material and supplies necessary for the assigned function.
9. Perform related duties and responsibilities as assigned.

**When assigned to any Utility Customer Service area:**

10. Assist utility customers with their accounts; set up new accounts; distribute welcome letters; update customer accounts as necessary; process open and closed accounts; coordinate account adjustments including payments plans, returned checks, name change and related adjustments.
11. Notify customers and maintain records on delinquent accounts, non-payments, returned checks and payment arrangements; prepare shut-off notices and courtesy tags
12. Coordinate and maintain contact with field personnel; complete work orders regarding water leaks, main breaks, high bills, fire hydrants, and water quality problems; arrange for turn-ons and shut-offs.
13. Perform a variety of collection functions; assign accounts to collection service; follow-up on payments and notify agencies when accounts are paid; recommend write-off of unpaid accounts, process bankruptcy notifications.

**When assigned to Front Lobby area:**

10. Receive and process new business license applications including related items for specialized operations such as filming, massage or vending, etc. through issuance of permit; route to appropriate staff for approval as necessary; interpret and explain policies and requirements related to permit procedures; and maintain files and materials necessary for business license processing.
11. Issue parking permits; maintain records on permits issued; and interpret and explain policies and requirements related to permit procedures
12. Perform a variety of data entry functions including processing accounts receivable invoices, purchase orders, inputting journal entries and budget adjustments.

**QUALIFICATIONS**

**Knowledge of:**

Principles and practices of effective customer service techniques.  
Basic accounting principles and practices.  
Principles and practices of record keeping methods and techniques.  
Cash handling and reconciliation techniques.  
Modern office procedures, methods and computer equipment.  
Basic principles of mathematics.  
Principles of basic report preparation  
Pertinent federal, state and local laws, codes and ordinances.

**Ability to:**

Maintain tactfulness and courtesy in difficult situations.  
Perform a variety of customer service and clerical accounting functions.  
Maintain and calculate customer accounts and permit applications.  
Correctly interpret and explain City policies and procedures.  
Perform mathematical calculations accurately and quickly.  
Operate office equipment including computers and supporting word processing software and spreadsheet applications.  
Type at a speed necessary for successful job performance.  
Understand and follow oral and written instructions.  
Communicate clearly and concisely, both orally and in writing.  
Maintain effective relationships with those contacted in the course of work.

**Experience and Training Guidelines**

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

**Experience:**

Two years of experience in customer service, including public contact.

**Training:**

Equivalent to the completion of the twelfth grade.

**WORKING CONDITIONS**

**Environmental Conditions:**

Office environment; exposure to computer screens; extensive customer/ public contact.

**Physical Conditions:**

Essential and marginal functions may require maintaining physical condition necessary for sitting for prolonged periods of time; extensive use of computer keyboard.