



Job Profile

Client Service Clerk

Job Details

Job Title	Client Service Clerk
Historic Job Title	Customer Service Clerk
Date Reviewed	2025-06-30
Location	Centurion

Position in Organisation

Structural Unit	Finance (Shared Services)
Position Being Evaluated	Client Service Clerk
Direct Line Manager	Accounts Receivable Manager
2nd Line Manager	Financial Manager (Shared Services)
Direct Subordinates	None

Position Description

Overall Purpose of the Job

To manage and optimise customer account operations, ensuring accurate account setup, master data integrity, and exceptional customer service. This role requires a strategic focus on credit management, data governance, and process improvement to support business objectives and enhance customer satisfaction.

Qualifications *(Formal Qualification Required)*

Minimum

- Grade 12 (NQF Level 4)
- Financial Diploma or equivalent - NQF Level 5 or an Equivalent Qualification

Ideal

- BCom Degree or equivalent (NQF Level 7)

Legal *(e.g. Driver's License, etc.)*

Minimum

- None

Ideal

- None



Experience *(Minimum Experience Required and number of years)*

Minimum	Minimum time spent in job
Financial or accounting experience	2 years
Customer service experience	2 years

KPA / Main Outputs and Responsibilities for this Position

The statements below are intended to describe the general nature and level of work being performed by the incumbent. They are not intended to be an exhaustive list of all the responsibilities and activities required of the position.

KPA / Main Outputs and Responsibilities for this Position	Prepared Description	Weighting / Time Spent
Customer Accounts Management	- Review <i>Retail Application Forms</i> for completeness and accuracy, coordinating with clients to obtain <i>Outstanding Information</i> - Conduct comprehensive <i>Credit Checks</i> and assess <i>Bank Credit Scores</i>, recommending appropriate <i>Credit Limits</i> to the Accounts Receivable Manager - Create <i>Customer Accounts</i> in the <i>ERP System</i> and <i>Montego Portal</i>, ensuring adherence to <i>Company Policies</i> - Communicate <i>Application Outcomes</i> to customers, issuing <i>Welcome emails</i> with supporting documents (e.g., <i>Price Lists</i> and <i>Login Details</i>) - Collaborate with Sales and Depot teams to assign and update <i>Route Codes</i> in the <i>ERP System</i> - Maintain <i>Customer Profile Accuracy</i>, updating systems and notifying Stakeholders of changes (e.g., address, VAT registration) - Reevaluate <i>Credit Limits</i> upon customer request, processing approvals or declines with clear communication and documentation - Oversee the <i>Statement Run Process</i>, distributing bulk and interim <i>Statements</i> as needed	40%
Customer Master Data Governance	- Ensure the accuracy and completeness of <i>Customer Master Data</i> by conducting weekly <i>Reviews</i> and <i>Audits</i> of groupings and required fields in the <i>Customer Grid</i> - Process <i>Change Request Forms</i> for <i>Master Data Updates</i>, importing new information into the system in collaboration with IT - Develop and refine <i>Data Governance Processes</i> to maintain the consistency and integrity of <i>Customer Data</i> - Liaise with IT to manage <i>Import Templates</i> for <i>Master Data Updates</i>, driving efficiency in <i>System Integration</i> and <i>Updates</i>	40%
Customer Service and Query Management	- Act as the <i>Primary Point of Contact</i> for <i>Customer Queries</i>, providing accurate and timely responses after obtaining necessary information - Escalate <i>Unresolved Issues</i> to appropriate Stakeholders, ensuring <i>Customer Concerns</i> are addressed promptly - Foster <i>Strong Relationships</i> with customers through professional interactions, proactive communication, and regular updates - Collaborate with the Accounts Receivable Manager to address <i>Systemic</i> or <i>Recurring Customer Issues</i>, recommending <i>Process Improvements</i> where needed	20%



Competencies (*Skills and Behaviour Attributes*)

Please note: The norm in the industry is to not have more than 7 Skills and Behavioural Attributes per job profile.

Skills

- **Technical Expertise:** Proficient in *ERP systems, Credit Assessment, and Customer Account Management*
- **Data Governance:** Strong knowledge of *Master Data Management Principles and Tools*
- **Process Improvement:** Capability to identify inefficiencies in *Account and Data Management Processes* and implement enhancements
- **Analytical Skills:** Ability to evaluate creditworthiness, identify trends in customer behaviour, and recommend actionable improvements

Behavioural Attributes

- Patience
- Attention to detail - Ensures data accuracy and compliance with *Company Policies*
- Thorough
- Assertive
- Customer-minded

Knowledge

- Knowledge of *Credit Checks, Ratings and Limits*
- Understanding of the *Retail Application Process*
- Knowledge of *Banking Policies and Procedures*
- Understanding of the *ERP system and the Montego Portal*

Special Requirements

- The Employee can be required to perform additional tasks over and above the primary tasks for which he/she is employed.
- Duties will be based on your specific skills and capability level and in accordance with operational requirements.
- Operational requirements may require you to carry out work that is to be done without delay and outside of your normal working hours.



Participants

Input Participants	
Participant Name	Participant Designation
Samantha Thompson	Customer Service Clerk
Lynnette Grobler	Accounts Receivable Manager
John Preston	Financial Director

Completed By	
Name	Title
Christine van Rensburg	21 st Century Executive Consultant