

POSITION DESCRIPTION
UPIC SOLUTIONS, INC

POSITION TITLE: Customer Service Representative
UNIT/ORGANIZATION: Information Services
REPORTS TO: Upic's Chief Information Officer (CIO) or designee
WORK LOCATION: Varies, see posting information

POSITION SUMMARY: The Customer Service Representative is responsible for database reporting, database maintenance and data cleansing routines utilizing UPIC's standard business application, Andar. The CSR will carry primary responsibility for assigned Upic customers and secondary responsibility for the Andar Help Desk. During the peak demand season, the position will specialize in data import/export functions, duplicate account remediation and e-giving portal management. Within the Andar Help Desk, the position creates work orders (tickets) and answers how-to questions from the user community, through developing/updating user community documentation. Position provides orientation training for new users on a scheduled basis. Finally, the position is responsible for gathering local United Way business requirements, including: timelines, standard and ad-hoc reporting/product needs.

KEY RESPONSIBILITY AREAS:

Weight	Responsibility
40%	1. Andar Database Support: Provides direct customer support to Andar help desk requests within one to two business days and with high levels of customer satisfaction. Creates standard database reporting and performs pre-scheduled data cleansing routines according to customer requirements/Upic standards.
20%	2. Processing Support: During the peak demand season, specializes in database import/export functions, duplicate account remediation and/or e-giving portal management based upon seasonal assignments.
20%	3. Andar Help Desk Support: Provides direct customer support to Andar help-desk requests by manning the Andar Help Desk one business day per week. Provides front-line user support and training on Andar & Upic Virtual Office via on-site sessions and through shifts on the service desk.
20%	4. Customer Knowledge & Support: Builds and processes a deep understanding of both the customer's needs and Upic's capabilities. Facilitates the identification and development of local Power User communities within assigned customer base. Convenes monthly meeting with CIO and key customers on emerging needs.

MINIMUM QUALIFICATIONS: Requires bachelor's degree or three or more years of technical support experience. Andar and United eWay certifications preferred. Extensive understanding of UPIC's standard business applications (Andar, United e-Way, Microsoft Word, Microsoft Excel, Microsoft Access, and other Microsoft applications) preferred. Excellent customer service, user training/support and demonstrated ability to establish and maintain good interpersonal relationships desired.

SPECIAL CONSIDERATIONS: Position reports to primary work location four days per week assisting assigned customer locations. On the fifth day per week, position works remotely supporting the Andar Help Desk function. Other work locations/schedules determined by mutual agreement. Relocation assistance may be provided, based upon posting notice.