

CREDIT ADMIN TRAINING – CHECKLIST

TRAINEE: _____

GENERAL COMPUTER & PRINTER/SCANNER

Check the box if you are satisfied that the trainee is able to:

- Scan a single page
- Scan multiple pages
- Scan multiple double-sided pages
- Create a folder on computer
- Rename a new folder
- Rename a file
- Delete a file
- Cut, copy and paste files to different folders
- Navigate to saved files/folders
- Resize files (if necessary)
- Print documents
- Copy documents
- Scan in colour (for ID)

EMAIL

Check the box if you are satisfied that the trainee is able to:

- Draft a professional email
- Understand – recipient, cc, subject, body of the email
- Attach documents to an email
- Remove attached documents
- Download and save attachments received
- Reply to an email
- Forward an email

ONLINE SHEETS

Check the box if you are satisfied that the trainee is able to:

- Access the Leadsheet
- Search within the Leadsheet (Ctrl + F)
- Complete the Leadsheet from appointment to application to pay out
- Complete the Client Info Form with the Client
- Access the Client Info Sheet
- Complete the Client Info Sheet (offers, submissions, paid out, notes, date last contacted)
- Access the Status Report
- Complete the Status Report for any POPs received
- Search within the Status Report (Ctrl + F)

UNDERSTANDING CUSTOMER DOCUMENTATION

Check the box if you are satisfied that the trainee is able to:

- PAYSリップ: Identify the BASIC SALARY
- PAYSリップ: Identify the OVERTIME/NON-REOCCURRING ALLOWANCES
- PAYSリップ: Identify the PERMANENT ALLOWANCES
- PAYSリップ: Identify the GROSS EARNINGS
- PAYSリップ: Identify the TAX DEDUCTION
- PAYSリップ: Identify the UIF DEDUCTION
- PAYSリップ: Identify the OTHER DEDUCTIONS
- PAYSリップ: Identify the NET SALARY
- PAYSリップ: Identify the EMPLOYER INFORMATION
- PAYSリップ: Identify the EMPLOYEE INFORMATION
- PAYSリップ: Identify the PAYROLL INFORMATION (eg dates, employee code, etc.)

- BANK STATEMENT: Identify the ACCOUNT NUMBER
- BANK STATEMENT: Identify the PRINT DATE
- BANK STATEMENT: Identify at least THREE SALARY PAYMENTS RECEIVED
- BANK STATEMENT: Identify any OTHER DEBIT ORDERS/ACCOUNTS
- BANK STATEMENTS: Identify any UNPAID DEBIT ORDERS

- ID: Ensure a fully visible book ID is received and submitted
- ID: Ensure the front and back of an ID card is received and submitted

APPLICATIONS & THE CREDIT PROCESS

Check the box if you are satisfied that the trainee is able to:

- Recite the maximum amount and term offered by each lender
 - Nedbank
 - Evolution Finance (Real People)
 - Fin Finance (Thuthukani)
 - Kanga (Lendcor)
 - Challenor (if applicable)
 - Capitec
- Recite how much cash each lender offers as a portion of the total credit
 - Nedbank
 - Evolution Finance (Real People)
 - Fin Finance (Thuthukani)
 - Kanga (Lendcor)
 - Challenor (if applicable)
 - Capitec
- Recite the age limit for each lender
 - Nedbank
 - Evolution Finance (Real People)
 - Fin Finance (Thuthukani)
 - Kanga (Lendcor)
 - Challenor (if applicable)
 - Capitec
- Identify the best lender for the client
- Process an application on the lender system from start to finish
 - Nedbank
 - Evolution Finance (Real People)
 - Fin Finance (Thuthukani)
 - Kanga (Lendcor)
 - Challenor (if applicable)
 - Capitec
- Understand each lender follow up process
 - Nedbank
 - Evolution Finance (Real People)
 - Fin Finance (Thuthukani)
 - Kanga (Lendcor)
 - Challenor (if applicable)
 - Capitec
- Open a Credit account at Build It – with the Build It staff
- Explain the CREDIT card system to the customer
- Ensure that the customer understands the importance of receiving & keeping his/her pin
- Ensure that customer understands how the pin code works and the buying process in store
- Request a new pin if necessary
- Operate the CREDIT POS system

GENERAL HOUSEKEEPING

Check the box if you are satisfied that the trainee is able to:

- Change a print cartridge
- Shut down and power up a computer
- Reset internet router
- Charge phone, laptop, POS device, speaker
- Lock up the kiosk
- Monitor stationery stock and order when low
- Monitor stock of CREDIT cards and flyers and order when low

REPORTING

Check the box if you are satisfied that the trainee is able to:

- Clock in/out with Ezclocker
- Draft and send a weekly report
- Provide feedback on promoter/s as well as additional management in store

CONFLICT MANAGEMENT

Check the box if you are satisfied that the trainee is able to:

- Report conflict with Build It staff (Personnel or Client)
- Report conflict with a Client