Assistant Credit Admin Checklist

1. Client Handling

    - Greet clients politely and explain the admin is not available
    - Do not promise approvals, payouts, or timelines
    - Call Head Office immediately
    - Put the client on speaker if Head Office asks

2. Communication & Escalation, call head office for the following:

    - New applications
    - Complaints
    - Application follow-ups
    - Confused or upset clients
    - Any assistance needed at the kiosk by the store
    - **Do not make any decisions without Head Office approval**

3. Record Keeping, complete the “Assistant Credit Admin Record Keeping Log”, by writing in:

    - Date – date of client visit
    - Time – time of client visit
    - Client name – full name and surname as per ID
    - Contact number –important to ensure this is correct for any follow up needed
    - Reason for visit – why is the client at the credit desk?
    - HO Person spoken to – who did you call at the head office? Who assisted you?
    - Instructions given by HO – what did the person at head office tell you to do?
    - Action taken by assistant – after your conversation with head office, what did you do?
    - Notes – any additional notes or comments you may have

4. Document Handling

    - Do not give client documents to anyone except Head Office
    - Scan and email any documents received from clients in-store or via email

5. Client Service & Professionalism

    - Stay calm, polite, and professional
    - Do not argue with clients
    - Escalate immediately if a client becomes upset or aggressive

6. End-of-Day Handover

Scan in your completed “Assistant Credit Admin Record Keeping Log” form and send to:

- support1@buildtoday.co.za

Remember – when in doubt, call

- Siviwe 083 487 0652
- Sino 065 724 2790
- Bukiwe 083 578 1012