



WESTMONT

Data Processor, Transaction Specialist

Technology Services

Position Summary: Responsible for accurate processing of all college financial transactions through the CRM. Builds and maintains forms to receive payments. Manages import records, import mappings, and deduplication to ensure data integrity at the college broadly. Provides reporting and training to departments as necessary.

Qualifications: Experience requirements include: 1+ years in an office setting, strong data entry skills, and strong capability in the use of Microsoft Office Suite. Ability to learn new processes and systems essential. Some Cloud based platforms (i.e. Salesforce) experience and Associate's or Bachelor's Degree with an analytical emphasis preferred. Must have strong communication skills, attention to detail, creativity, and persistence, self-motivation in applying research and analytical abilities to technical solution-building to support the college's mission. Also requires personal affirmation of the Christian mission of Westmont College and the Community Life Statement and adherence to its behavioral expectations. Other requirements include: organizational skills, accurate work and strong attention to detail, ability to meet deadlines. Must be able to work independently and as a team player.

Responsibilities:

- Process over \$25,000,000 annually in gifts, pledges, securities, in-kind gifts, deferred gifts and ticket transactions in Salesforce, ensuring that each digital transaction is entered and/or uploaded quickly and accurately. The goal is to provide a timely, supportive, and positive experience for the customer.
- Promptly process gifts and pledges following established procedures, including those made via on-line giving page, credit card, and electronic fund transfer, etc.
- Maintain and produce all receipts, letters and acknowledgements generated by gift entry. Maintain pledges in the system; produce reminders, including campaign pledge reminders; provide needed backup to the business office.
- Add and update biographical data received as part of transactions.
- Prepare daily reconciliation of checks, cash and charges and run transmittal reports for business office; transmit entered gifts to college's financial system.
- Build forms with FormAssembly (SaaS tool) to receive charitable or non-charitable transactions
- Create designations in Salesforce and work with the business office to create the corresponding GL account.
- Manage Credit Card payment processing platform, including refunding transactions when necessary.
- Build and run Salesforce reports as directed. Maintains necessary changes and enhancements to current reports requested by college constituents. This includes academic department requests as well as administrative offices.
- Maintain the highest level of integrity when communicating information to others and working with sensitive and confidential information.
- Cross train and assist Sr. Application Data Processor with data entry needs during peak application season: transcripts, letters of recommendation, supplement information.
- Expectations for workplace demeanor include but are not limited to: working collaboratively and harmoniously with co-workers, customers and others by sharing ideas and resources willingly, constructively and positively; listening to and objectively and respectfully considering the ideas and perspectives of others; readily admitting and correcting personal mistakes; meeting commitments; keeping your supervisor and others who may be affected informed about work progress; addressing problems willingly and constructively to discover practical and lasting solutions acceptable to all parties; working

promptly toward reconciliation and forgiveness during conflict; respecting the diversity of our community in words and deeds.

- Other duties as needed.

Reports to: Sr. Data Processor, Transaction Specialist

7.2021