OPERATIONS

Operations Assistant

JD NUMBER	REVISION	FLSA STATUS
JD-GEN-13	**Rev 2 · 2026-08-08**	**Non-Exempt**
REPORTS TO	**PAY GRADE**	**LOCATION**
Chief Operating Officer (interim; Operations Manager when filled)	**A2**	**Phoenix, AZ — on-site (equipment intake, receiving/dispatch, and in-person quoting/invoicing require physical presence, per Employee Handbook Appendix H)**
SUPERVISES		
None		

POSITION SUMMARY

The Operations Assistant is the front-of-house operational hub of Field Calibrations, Inc. — the single role that runs the customer-facing operational cycle: quoting, inbound receiving, laboratory intake, invoicing, and outbound dispatch. This role consolidates responsibilities previously held by two separate positions (Customer Service Representative and AR/AP Technician) into a single unified operations function aligned with FCI's actual scale and workflow. The Operations Assistant is a critical quality-system touchpoint responsible for accurate equipment identification, chain-of-custody documentation, and invoice accuracy.

ISO/IEC 17025:2017 Alignment	Clause 7.1 — Customer order intake, quote generation, and review of requests/tenders/contracts for completeness of customer-supplied equipment information and scope-of-accreditation compliance before laboratory acceptance; Clause 7.4 — Handling of test/calibration items (condition verification, identification, custody, storage, and dispatch); Clause 7.11 — Maintenance of intake records, condition photographs, quotes, invoices, and customer authorization documentation as controlled records subject to FCI's document retention schedule; Clause 6.6 — Supports the QA Manager on the Approved Supplier List (ASL) by filing supplier qualification evidence and flagging expired supplier accreditations.
FCI Quality Program	Maintains accurate customer equipment intake logs, quotes, and invoices as controlled quality records per FCI's document control procedure; records and communicates pre-existing damage (condition exceptions) to the Laboratory Manager before calibration assignment to prevent acceptance of liability for pre-existing conditions; confirms that customer-supplied equipment paperwork (PO, customer asset list, special instructions) is complete and attached to the work order before releasing items to the calibration queue; supports the QA Manager's document control program by maintaining intake, quote, and invoice records in the prescribed format and retention schedule.

ESSENTIAL DUTIES & RESPONSIBILITIES

- Prepare and issue customer quotes in QuickBooks (or FCI's quoting tool) upon receipt of a customer request — verify scope-of-accreditation coverage with the Laboratory Manager, apply contractual or catalog pricing, and submit for COO approval where required by the authorization matrix.

- Receive all inbound customer equipment shipments via UPS, FedEx, LTL freight, and customer-direct drop-off; inspect each package for transit damage, document package condition before opening, and report damage claims to the shipping carrier and Laboratory Manager.
- Perform equipment intake for every received instrument — verify serial number against customer-provided asset list or purchase order, photograph the instrument condition (front, back, any pre-existing damage), generate an FCI Identification Number (FCID) in MET/TEAM, and attach the customer work order documentation.
- Log all incoming equipment into MET/TEAM with complete intake metadata: customer name, PO number, instrument make/model/serial number, FCID, condition code, customer-specified turnaround requirements, and any special calibration instructions.
- Communicate equipment receipt confirmations to customers via email or customer portal within one (1) business day of intake completion; include FCID assignment, estimated turnaround time, and any condition exceptions identified during intake.
- Generate and issue customer invoices in QuickBooks upon completion of the work order — verify invoice line items match the approved work order (FCID list, services rendered, contractual pricing) before issuance.
- Manage accounts receivable aging — monitor open invoices weekly, send payment reminders at 30/45/60-day intervals per FCI's collections procedure, and escalate accounts over 90 days past due to the COO with a recommended action.
- Apply customer payments in QuickBooks — post checks, ACH transfers, and credit card receipts to the correct customer accounts; reconcile daily payment batches against bank deposits.
- Receive, verify, and enter vendor bills in QuickBooks — confirm receipt of goods or services against the associated PO before approving vendor bill entry; flag discrepancies to the COO before payment.
- Schedule outbound equipment shipments — select the appropriate carrier and service level per the customer's shipping instructions, prepare shipping labels, package the completed instrument for return, and record the tracking number in MET/TEAM against the FCID.
- Support the annual financial review or audit by providing organized QuickBooks records, quotes, invoices, and intake documentation as requested.
- Support the QA Manager and Laboratory Manager on ISO/IEC 17025 record control — file intake records, condition photos, quotes, invoices, and shipping confirmations in the format and retention schedule defined by FCI's document control procedure.

REQUIRED QUALIFICATIONS

- High school diploma or equivalent; associate's degree or higher in Business Administration, Accounting, Logistics, or a related field preferred.
- Minimum three (3) years of combined experience in customer service, equipment receiving/shipping, invoicing, or accounts receivable in a technical services, laboratory, engineering services, or logistics environment.
- Demonstrated proficiency in QuickBooks (Desktop or Online) for quote generation, invoicing, payment application, and AR aging report generation.
- Comfort operating a computerized inventory or LIMS system (MET/TEAM, Indysoft, or equivalent) for equipment intake logging and record maintenance.
- Strong organizational and time-management skills with the ability to run multiple concurrent workflows (intake, quoting, invoicing, dispatch) without dropping commitments.
- Professional written and verbal communication skills for customer intake confirmations, collections follow-up, and internal coordination with laboratory technicians and management.

- Physical capability to lift and move packages up to fifty (50) pounds and to stand, walk, and bend during receiving, intake, and dispatch operations.

PREFERRED QUALIFICATIONS

- Prior experience in a calibration laboratory, metrology environment, or ISO/IEC 17025 accredited services organization.
- Familiarity with MET/TEAM, MET/CAL, or Indysoft Calibration Manager.
- Experience preparing quotes and invoices under government contract vehicles (T&M;, FFP, or IDIQ conventions).
- QuickBooks ProAdvisor certification or equivalent advanced QuickBooks credential.
- Familiarity with ISO/IEC 17025:2017 record control and supplier qualification concepts (Clauses 6.6, 7.11).
- Bilingual English/Spanish for customer service.

PHYSICAL DEMANDS & WORK ENVIRONMENT

Physical demands	Combined office and lab-adjacent work environment. Regular lifting and moving of equipment packages up to fifty (50) pounds. Extended periods of computer use for quoting, invoicing, and record maintenance, alternated with active receiving, intake, and dispatch tasks that require standing, walking, and bending.
Work environment	Climate-controlled office adjacent to a temperature- and humidity-controlled calibration laboratory. Occasional exposure to shipping/receiving areas, equipment carts, and the front-desk customer-service area. This role handles customer financial information and pricing data — discretion and confidentiality are essential.

SCOPE OF DUTIES

This position description is not exhaustive. The employee is expected to perform other duties and responsibilities as required to support Field Calibrations, Inc.'s operations, its accreditation, and its customers. Responsibilities and duties will evolve based on acquired skills, completed training, business needs, and opportunities identified by leadership. This position offers growth opportunities within Field Calibrations, Inc. for employees who demonstrate initiative, reliability, and continued professional development. Management retains the right to add, remove, or modify duties and responsibilities at any time to support the operational, quality, and strategic goals of Field Calibrations, Inc.

EQUAL EMPLOYMENT OPPORTUNITY

Field Calibrations, Inc. is an equal opportunity employer. We do not discriminate on the basis of race, color, religion, national origin, sex, age, disability, veteran status, sexual orientation, gender identity, or any other protected status.

VETERAN HIRING PREFERENCE

Field Calibrations, Inc. observes a veteran hiring preference across all positions. Qualified veterans and transitioning service members are strongly encouraged to apply and will receive preferential consideration consistent with applicable state and federal law and FCI hiring policy.

APPLICANT ACKNOWLEDGMENT

By signing below, I confirm that I have read this job description and understand the duties, qualifications, and working conditions of this position.

Signature _____ **Date** _____

Printed name _____