

## **Booking Coordinator**

### **Key Responsibilities**

#### **Diary Management**

- To allocate all jobs to an appropriate Surveyor and giving priority to the Principle and Senior Surveyors.
- To know the weekly availability of all contract Surveyors by calling a week ahead and keeping a record in the main diary.
- Ensure all jobs are allocated to be carried out as soon as possible and where necessary managing/re-arranging the diary to ensure urgent jobs can be carried out as required.
- Ensure all jobs are noted in the diary, with all appropriate details recorded.
- To keep the diary completely up to date, ensuring any changes or amendments are recorded.

#### **Booking jobs and liaising with Surveyors, clients, access contacts and referral**

- Where appropriate, to speak to the Surveyor to be booked to confirm the job.
- To arrange access to the property to be inspected by contacting the contact nominated by the Client, Intermediary or Bank/ Building Society.
- To send email confirmation of the appointment to the client detailing; the date of inspection, confirmation of payment, the Surveyors details and attaching the appropriate Alexander Lyons terms and conditions of engagement.
- To compile a pack for each of the Principle Surveyors inspections and ensure these are handed over in advance of the day of the job.
- To send email confirmation to the Surveyor, detailing; date, time, means of access, property details, client contact information, client queries or concerns about the property and attaching the Quest instruction sheet and where appropriate a Bank instruction.
- Where appropriate send email confirmation to whoever referred the job to Alexander Lyons.
- To ensure any information/details provided to Alexander Lyons relating to a job is forwarded to the appropriate party.

#### **Data Entry and logging of information**

- All jobs booked to be accurately recorded on the target board and all necessary information to be entered.
- Ensure that the board is up to date at all times, any amendments made, cancellations or jobs on hold noted.
- Accurately enter the details onto the manual invoice sheet.
- Daily check of Quest print out of jobs booked against the target board.
- All jobs to be accurately loaded onto Quest with all necessary information entered.
- Each entry on Quest is to be kept up to date with the booking progress plus making any necessary amendments.
  
- Booking Checklists to be filled out for each job and kept up to date.
- Update the log daily with new jobs.
- Log all Terms and Conditions of Engagement when returned by the client.

**Other duties**

- Process card payments or raise and send invoice for payment.
- Setting up job files on the system and saving all emails sent/received into it.
- Print all emails sent/received into the physical job file.
- Cross reference the property address with the Royal Mail post code finder.
- At the end of the month raise credit notes for any jobs that we have taken money for but have not been carried out.
- To answer the phone and distribute calls to appropriate person or take messages.