



Order Management Specialist

CRI-Lagunilla de Heredia-Ultra

Posted 30+ Days Ago

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Full time

R0019736

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About Us

REFINITIV is looking for an Order Management Specialist with base in Costa Rica



Scope and Impact

- Account management responsibility: Small-Medium clients with simple installed positions and standard commercial terms.
- The scope involves problem solving various ad hoc requests which may be standard to complex in nature.

Refinitiv equips the financial community with access to an open platform that uncovers opportunity and catalyzes change. With a dynamic combination of data,

Responsibilities

- Responsible for the implementation of the entire order to billing process and for providing ongoing order management support for sales and clients.
- Aligned to a designated client base and is accountable for building relationships with internal and external customers, playing a key role in improving service results.
- Confirms all client orders are correct for sales and financial reporting and is accountable for adhering to SOX compliance controls and 3rd party guidelines.
- Manage the entire end to end order life cycle, including order preparation, order monitoring, permission and billing/credits/cancellations for new and renewal orders.
- Obtain information required to process orders (user data, product reference details, installation details, exchange requests, billing dates, sales codes, billing account contacts).
- Ensure appropriate technical and commercial approvals are in place.
- Provide research and support for billing disputes, ensuring issues are resolved according to departmental guidelines (which may include Service Level Agreements).
- Ensure any off-line pricing calculators and/or product-specific checklists are completed.
- Verify equipments needs, communication requirements and general client needs, making sure to provide time-frames and set client expectations accordingly.
- Manage back orders with internal partners, escalating all delays where interaction is required.
- Make sure forecasted install and billing effective dates are accurately uploaded into tracking tool (based on local tools).
- Implement release of billing for all services and charges.
- Maintain accurate client site billing & location details, and contact/user records on internal systems.
- Reconcile out of date Opportunities to orders.
- Provide timely support and resolution regarding Data and Compliance issues.
- Process order adjustments, applying appropriate commercial policies and guidelines.
- Establish key client and sales relationships in order to facilitate improved administration and customer satisfaction.
- Assist in annual renewals processing, including analyzing pricing, reviewing amendments and invoicing.
- Manage and resolve external & internal queries relating to quote/order status, billing, client account information/permissioning, and compliance issues.
- Lead ad hoc initiatives with relevant groups, ensuring customer requests are successfully implemented.
- Spot trends and make recommendations for enhancing

applications, tools, and content—all supported by human expertise. At Refinitiv, we facilitate the connections that propel people and organizations to find new possibilities to move forward.

HOW TO APPLY?

If you want to apply for this job, please click the “Apply” button to the left. You will then be redirected to the sign-in page where you can enter your credentials or set up an account with us.

Suggested Jobs

[Order Management Specialist](#)

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[Order Management Specialist](#)

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[Order Management Team Manager](#)

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- Partner and engage with multiple groups to enhance the customer's ease of doing business with Refinitiv

Knowledge & Skills

- Systems knowledge: Working knowledge of local/business-based core order management systems.
- Strong knowledge of order management, entitlement and billing policies, processes and systems.
- Demonstrate problem solving skills, work prioritization, organization and escalation skills.
- Flexibility and an appreciation of a fast-moving and international environment.
- Exceptional customer service skills and proven ability to build successful relationships with internal and external clients.
- Detail oriented with good analytical/critical thinking skills.
- Ability to communicate professionally at all levels and work in a team.
- Understanding of compliance with company practices and methods of working.

Qualifications/Requirements

- English (Fluent) and Portugues (Fluent) is relevant
- First level university degree or equivalent experience
- Typically 2-4 years of related experience (e.g., customer service, procurement, accounting, finance,).
- Developed problem-solving and analytical skills.
- Demonstrated teamwork and collaboration skills.

Professional Experience

- Previous account management/order processing/customer service experience.
- Systems knowledge: Working knowledge of local/business tools and core order management
- systems, including local back office systems (i.e. Siebel, SAP).

Impressive benefits? Of course.

We support our colleagues' health and wellbeing with inclusive benefits. So that's support for physical, financial, mental and environmental health, paid time off to volunteer, consumer discounts& savings and so much more. All of which are tailored to your needs and may vary by location. For more details talk to your recruiter.

As a global business, Refinitiv relies on diversity of culture and thought to deliver on our goals. Therefore we seek hardworking,



status, or any other protected classification under country or local law. Refinitiv is proud to be an Equal Employment Opportunity/Affirmative Action Employer providing a drug-free workplace.

Refinitiv makes reasonable accommodations for applicants and employees with disabilities. If an accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact us to request an accommodation. A full list of our office locations and contact information can be found at: [Refinitiv Office Locations](#).

Be the breakthrough, activate your future and shape ours.

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