   Hello, just to followup on our interview today, I just wanted to show some key points I took from our interview and ensure I understood correctly.

-Parts can be searched by part number or part name in the Inventory

-Ideally a customer only has one account, but the customer can have more than one account between the two systems.

-An order list is generally kept on paper, then updated to the system at the end of the day. The order is created on the computer, it is sent to accounting for a purchase order number, with. The purchase order number they can then send it to the warehouse via fax. Customer information is not sent to the warehouse.

-After receiving the packing slip and confirming that the contents match the slip. The purchase order in the system is updated, if the [**Order**](http://gatherer.wizards.com/Pages/Search/Default.aspx?name=%5B%22Order%20%2F%2F%20Chaos%22%5D&partner=AUTOANY) Quantity matches the Shipped Quantity then they hit a button “Received” and it completes the order. If the Shipped Quantity does not match the [**Order**](http://gatherer.wizards.com/Pages/Search/Default.aspx?name=%5B%22Order%20%2F%2F%20Chaos%22%5D&partner=AUTOANY) Quantity, then they adjust the **[Order](http://gatherer.wizards.com/Pages/Search/Default.aspx?name=%5B%22Order%20%2F%2F%20Chaos%22%5D&partner=AUTOANY)** quantity to the amount of Shipped Quantity, hit “Received” and the order stays outstanding in the system. When the order is completed, it goes to accounts payable, billed at the end of the month.

-If a customer has a special order(part not available), then they must pay a deposit to cover the potential restocking fee. Deposits paid are kept on paper.

-After orders received, it is to be compared against a list that has customers with pending orders.

-Reporting – Currently not used often mostly due to inaccurate information.

-Customer information is taken when possible. However, there are sometimes issues if they received a customer complaint due to issues checking recorded information. Often the information is taken, but hard to get back in order to verify with the customer in time. Ex: What service technician worked on a vehicle for a certain customer.

Thank you again for taking the time today for our interview.

Regards,

Zenon Marsh

How do you search by parts?

Search by part, name

Verify with inventory to make sure they have it, printing is optional because it is not needed…unless it is

a large order.

Customer Accounts?

Ideally a customer has only 1 account, currently there is multiple accounts between systems.

They hold the special accounts in the system.

Some customers are tracked, some are not. If they say to being in the system, they do not put them in

the system. They ask. They confirm phone numbers or addresses while people come in.

Ordering for customers?

Order list is done on paper or in the system, then should be inputted into the system by the end of the

day. They create the order on the computer, it gets sent to accounting for a purchase order number,

once they have that they send the order to the warehouse. They do not fax customer information.

No customer on information.

After confirming the packing slip matches the contents, they update the system on the purchase

order…if the Shipped Quantity matches the Order Quantity, then they choose receive and the items

received update the inventory in the system. (See Figure 2.4 for this!!!!!!) and completes the order.

If the shipped quantity is less than Order quantity(so they did not get all of their parts) then they hit

received, updates the inventory and stays outstanding until other parts received. –When order is

completed it goes to accounts payable, billed at the end of the month.

Deposit is needed for any special orders, due to customers possibly not picking it up and they must pay a

restocking fee. Deposit is ASSUMED to be used as the restocking fee. Warehouse charges the restocking

fee.

Deposit is written on paper, probably on the sheet. Take the money there, tracked on paper. No note in

the system about that at all.

After order received, someone is supposed to check the pre-order/special order list. And sometimes due

to human error, some of those items can go back into inventory by human error.

Reporting – He said it sucks, he said it is so innacurate, difficult to dig into the system. Big issue for

customer complaints, as information is scattered throughout the system.

Reporting is manual work, on paper, or in the system but innacurate.

Hello, I would like to thank you again for the interview the other day. I took some notes from the interview and was hoping you could check to see if I was correct, or perhaps misunderstood anything. My apologies for not sending this more promptly, and for the length of this email.  
  
Thank you,  
  
Zenon Marsh  
  
  
-Customers can purchase parts without giving information, the parts associate can choose to go right to an invoice from the system and just sell it to the customer.  
  
-If the customer has a record, then the parts associate can search for their record, then print create a invoice from that  
-When the Invoice is finalized(in either system), it updates the inventory in the Parts System  
  
-When orders are made in the evening, common items that are needed to be reordered are flagged and get put on that order list. They can also choose to edit this and put 0 for the part if they do not wish to have it added to the order list.  
  
-If a customer's special order is received, it is updated as usual to the inventory system, but the part is set aside for the customer. Ex: 3 Spark plugs received and updated to the inventory in the system...1 of these sparkplugs are a special order for the customer, 2 are put into physical inventory and 1 is set aside for the customer  
  
Question: With legitimate returns, the customer pays a 20% handling charge and receives a credit. Can you explain this process?  
Is placed back into inventory? Is it sold at a discount? How is the credit kept track of?  
  
Answer: The 20% fee is rarely actually charged, it is only for rare cases, and legally it is something the company can fall back on. Most returns are simply an exchange of cash back for the part. Credit would not be something tracked in the parts system.  
  
Question: What happens if the contents of the purchase orders do not match the packing slip?  
  
Answer: If the contents do not match the slip, its essentially "becomes a crime scene". The shipment is on "lockdown", and the warehouse is called regarding the matter. This does not happen often, but it is something that you will resolve.   
  
Question: Item is missing or broken in orders (on arrival and onsite), what is the process?  
  
Answer: If item is missing, it is similar if the contents do not match the slip, it is handled case by case. It is considered "shrinkage".  
  
Question: How are discounts determined? Is there a certain % stored in the system for certain customers?  
  
Answer: Discounts are a selection/option in every customer record. They can be given a certain discount. It is shown on their system when creating invoices etc, but is not shown on the invoice after printed.  
  
Question: The service technicians can quote based off of the AllData system for some jobs. If a job is listed as taking as 3.5 hours, and the service technician finishes in 2, is this currently tracked? What do they generally do with downtime in between jobs?  
  
Answer: Standard jobs that have a fixed price remain at that price, regardless if it takes less or more time. As for technicians, when they complete a job they return to the Service Writers and are generally given more work orders/jobs to complete. Their time is not something that is necessarily recorded on paper, but the Service Writers usually have an idea of the hours they work(as they are so closely interrelated).  
  
My understanding of the Service System/Work [**Order**](http://gatherer.wizards.com/Pages/Search/Default.aspx?name=%5B%22Order%20%2F%2F%20Chaos%22%5D&partner=AUTOANY) Process:  
1. Customer approaches service writer  
2. Service writer, similar to the inventory system, checks to see if customer has a record  
3. If not, generates one  
4. Service writer takes what the customer said (it’s making ting ting noises) and writes up a work   
order, and gets their signature on the work order. Tells them they will be called etc when work is done  
5. Service writer gives the work order to a service technician  
6. Service technician generally would do a diagnostic, or checkout the car to see what part(s) is/are needed.  
7. Service technician goes to Parts associate if needed, retrieves part. Parts associate does NOT update inventory in the system  
8. The technician fixes the car with the part used etc  
9. When finished he returns with the work order  
10. Service writer takes the work order, and then fills out the rest of the information with what was wrong with it, and what was replaced etc with comments. The work order BECOMES/TURNS into the invoice.  
11. The customer is contacted or returns, gets the invoice and pays cash if a cash job  
  
-One big problem that can arise out of this situation is the part being taken by the Service Technician earlier in the day, fixing the vehicle later, and the system is not updated until the Invoice is created in the Service System.  
  
-Invoices only update the inventory in either system ONLY after it has been finalized. When they are generating an invoice, they have an option to cancel on that screen.

Here it is sorry.

Initial interview with Monica Munoz:

            The only interaction she would have between the parts associates and the service writers would be financially and would only be involved if there was a discrepancy

                I don’t remember saying this. I (Monica) have no direct dealings with either group.

            Has ~~very~~little interaction with Jose Perez, only when there is an issue needing to be handled.

                        Changes to documents(work request , purchase order). What changes???

                        Comes to Monica Munoz attention if account is unpaid That is one example.

            Receives end of day, monthly, and quarterly reporting from Chris Patstone.

            Creates financial statements from the three aforementioned requests.

            Forwards warranty reimbursement requests to nissan Canada.

            receives no reports from the AllData or fast system.

            Doesn't interact with the current system other than to get the price difference on a part or general inquiries. This was in reference to Fast and AllData.

            Communicates day to day with William Nolan, including the over seeing of Chris Patstone. Not daily but often.

            William Nolan may ask for reporting, but currently there are no formal reports between Monica Munoz and William Nolan. The formal reports are Financial Statements.but there are ad-hoc requests.

            Chris Patstone would deal with the creating of credit based accounts.

            Eduardo Concepcion would deal with taking customer name and telephone numbers to create accounts. I did not say that!

            All reports are out of date, inventory could be up to a week out of date. This was about the current parts/service system(s).

**[Loss](http://gatherer.wizards.com/Pages/Search/Default.aspx?name=%5B%22Loss%22%5D&partner=AUTOANY)** might not be recorded(Ex. service tech dropping a light and not recording it. This was about the current parts/service system(s).

            No formal customer complaint process, or means to create a complaint.

            Monica is concerned with the bottom line, should Speak to Eduardo to clarify how hours and task assignment might be delegated.

            Monica is interested in seeing productivity reports on how long tasks are taking to be completed. Currently this is not present in the system.

Hello, I would like to thank you for taking the time to meet with myself and Jack Watt on Thursday. I have assembled some notes and was hoping you could confirm I did not misunderstand anything that was discussed.

·         A service technician requires a work order to retrieve a part from an Inventory associate.

·         The inventory associate adds the part number to the work order for the Service Technician

·         If the Inventory Associate is too busy dealing with too many Service Techs at once(for example), the Inventory Associate may ask the Service Tech to mark down the part number himself. At times the service technicians may be too busy to remember, in this case a part is sold without being charged and the inventory also shows 1 more than they really have.

·         Services could be broken down into Client-Billable and non-client billable. Non-billable services could be due to warranty, recalls or in rare cases (possibly due to customer issues) a free service for the customer

·         A Customer is asked if they wish to be put on an orderlist, they may say no and choose to buy the part elsewhere

·         Customer may be asked to pay deposit and refuse, thus not being added to the order list as well

Regards,

Zenon Marsh

Hello Chris,

This is just a follow-up to our interview on Wednesday the 25th.

Within the system you have a report for accounts that are overdue referred to as 30/60/90 and essentially it’s a system to determine accounts that are overdue on payments for work or parts. Generally what is supposed to happen is that accounts at the 90 day mark or when an account is at its max the person’s name is written down on a list. This information should be passed on to the parts manager by Monica. They are from the Accounting system and go to Monica, what she does with them is not my concern. (Sybil – this sounds like you are trying to tell Chris what to do. Br very careful when and how you make **suggestions**!!)

Some reports sent to Monica are customer invoice receipt, containing grand totals, how much was paid in cash, credit or cheque; as well as daily exceptions, missing items for example.

Generally ~~on~~ for issues with missing ~~parts~~ invoices??you will take a walk-through to see if you can find them yourself, an extensive search for partswould be done by Monica who may enlist Jose’s assistance. There also appears to a big issue with parts missing for an undetermined reason. The missing parts are only ~~every~~ ever really ~~actually~~ accounted for until the yearly audit is done. That’s when parts are identified as missing and not sold.This section makes no sense to me. I do not deal with parts except for the yearly audit.

In regards to creating accounts you enter the customer information and send out financial checks on customers and if they are authorized you create the account and they are assigned a “credit limit”. This is also all done on paper.

You have issues with service records,I do not deal with service records it can be difficult to determine exactly what kind of work is done be it warranty or not. If part and work is listed as warranty, its warranty covered work; part covered and not work covered is listed as recall; anything else is regular work.

https://mail.google.com/mail/ca/u/0/images/cleardot.gif

I believe this covers most of the important parts of what we discussed. Any clarification if necessary is appreciated.

Hello Chris,

This is just a follow-up to our interview on Friday Sept 20th. I would like to go over some key points we had noted during that interview.

When asked about the current processes about ordering parts from your point of view you had advised us that it is functioning but not entirely reliable. In some cases you are not being sent all the proper information in regards to ordering parts for inventory. Sometimes you are just receiving invoices from the suppliers and you have to ask Jose Perez about the order to verify the information sent by supplier. Generally you are expecting a fax from Jose about an order that needs to be processed.(He sends the paper copy of the fax to Monica after it is sent to our supplier.)

Daily you are given a pile of invoices and work orders in which you use to enter in daily information on purchases and work orders that have been processed throughout the day. We call them Customer Invoices.

If possible we would like to clarify when this information is generally inputted into the system and how long it generally takes. Also we would like to clarify what information it is you require off of the invoices or work orders. Done late in the day and in the morning if they are not finished. Only the Invoice number and totals for Labor and parts are recorded.

The system will tell you when information appears to be missing from your pile but you generally don’t know why this information is missing which requires you to find the missing files. In the case of work orders on account, that information isn't always documented as missing. When those files are missing it affects work order totals. Our accounting system can identify  missing invoice number but we don’t always run this report. What file??

Questions for Eduardo Concepcion

1. How would you handle loss (ex. Breaking a light before installing it into a car)what process would be taken to reflect the loss in inventory?

Answer:

Service technician would bring back a broken or malfunctioning part to the part desk. It is out of a technicians scope to worry about loss. Any reflection on inventory should be clarified through the part associate. Jose Perez should be able to confirm how the parts associate would handle this process.

2. How are you assigned your daily tasks?

Answer:

All tasks assigned to the service technicians are done so through the service writers. Service technicians may help other technicians when needed. Multiple people are assigned to multiple tasks, the tracking of this process should be clarified through Jose Perez.

3. How do you track your time? If you are assigned to a task that is billed at 1.4 hours, and you finish it quicker than the allotted time, is this something you need to keep track of? Possibly doing other tasks?

The service technicians don't track their time. They simply do their job, with productivity in mind. The service writers assign the tasks, and may have more information on if and how this process is tracked.

4. Is there ever a time that a vehicle will sit in a service bay(ex. waiting for a part to be brought)?

Vehicles can sit in a bay waiting for a part, or service. Typically these aren't moved unless needed.

5. Do you have a way to determine which service bays are available and which are occupied?

Basically just look and see.

6. If you have a task that requires another service technician to assist you how would you go about doing so?

A service technician would ask another technician to help or inform the service writer they needed someone to help them. Typical it's one technician one work order. There is no formal process to request help.

7. Is there an expected turn around time? and if you were to go over it how would you go about contacting the customer to inform them? Are they then charged by the hour?

A service technician would inform the service writer that for whatever reason they might need extra time. This might be a situation of contacting a customer to see if they want them to go ahead with a new fix or service needed.

8. Do you have customer parking that is tracked? (ex knowing that a specific customers car is parked in row 3 spot 6 and needs to be moved to a specific service bay to be worked on)?

Wasn't really covered.

(If time permits, the following questions)

9. Can you walk us through your daily interaction with the parts associate?

A service technician would request a part, or how long it might take to receive a part.

10. Does a situation ever arise that a car is in a service bay, you have checked inventory and have the part on hand but when you actually go to retrieve the part you don't actually have it in inventory? If so how would you handle this?

A service technician might get a part externally if they can't acquire one.

Initial interview with Monica Munoz:  
  
The only interaction she would have between the parts associates and the service writers would be financially and would only be involved if there was a discrepancy  
  
Has very little interaction with Jose Perez, only when there is an issue needing to be handled.   
Changes to documents(work request , purchase order)  
Comes to Monica Munoz attention if account is unpaid  
  
Receives end of day, monthly, and quarterly reporting from Chris Patstone.  
  
Creates financial statements from the three aforementioned requests.  
  
Forwards warranty reimbursement requests to nissan Canada.  
  
receives no reports from the AllData or fast system.  
  
Doesn't interact with the current system other than to get the price difference on a part or general inquiries.  
  
Communicates day to day with William Nolan, including the over seeing of Chris Patstone  
  
William Nolan may ask for reporting, but currently there are no formal reports between Monica Munoz and William Nolan  
  
Chris Patstone would deal with the creating of credit based accounts.  
  
Eduardo Concepcion would deal with taking customer name and telephone numbers to create accounts.  
  
All reports are out of date, inventory could be up to a week out of date.  
  
Loss might not be recorded(Ex. service tech dropping a light and not recording it.  
  
No formal customer complaint process, or means to create a complaint.  
  
Monica is concerned with the bottom line, should Speak to Eduardo to clarify how hours and task assignment might be delegated.  
  
Monica is interested in seeing productivity reports on how long tasks are taking to be completed. Currently this is not present in the system.

Service technician would bring back a broken or malfunctioning part to the part desk. It is out of a technicians scope to worry about loss. Any reflection on inventory should be clarified through the part associate.

All tasks assigned to the service technicians are done so through the service writers. Service technicians may help other technicians when needed. Multiple people can be assigned to multiple tasks.

The service technicians don't track their time. They simply do their job, with productivity in mind. The service writers assign the tasks, and may have more information on if and how this process is tracked.

Vehicles can sit in a bay waiting for a part, or service. Typically these aren't moved unless needed.

A service technician would ask another technician to help or inform the service writer they needed someone to help them. Typically it's one technician one work order. There is no formal process to request help.

A service technician would inform the service writer that for whatever reason they might need extra time. This might be a situation of contacting a customer to see if they want them to go ahead with a new fix or service needed.

A service technician would request a part, or how long it might take to receive a part from the parts associate. If needed, a part can be sent in by Purolator for example from a Nissan dealership in a nearby town.