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.

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 issues with missing parts you will take a walkthrough to see if you can find them yourself, an extensive search for parts would 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 really actually accounted for until the yearly audit is done. That’s when parts are identified as missing and not sold.

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, 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.

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