

**Processing Cylinders at Point-of-Sale
Using Cylinder Serial Number Tracking and
Handheld Computers**



Introduction

In order to efficiently process cylinders with serial numbers into CylTech 2, when customers come to the sales counter, there must first be established a policy regarding how they will be processed. This simply means where will the process begin? Will it begin at the dock or at the sales counter?

Starting the Process at the Dock

If you're considering starting the process at the dock, then are only cylinders being handled? Is the customer just dropping off empty cylinders and picking up full cylinders? If there is no reason for the customer to go inside, the entire process can be handled at the dock by using Palm Order Pad (POP) on a handheld computer.



The process would be to start a ticket on the handheld computer, enter the customer number (or search for it), enter the ships and returns, total the ticket and then print the receipt. For consistency and simplification, it is recommended that the same blue tooth printer be used at the dock as would be used on the truck. **Note:** tickets created on the handheld computer will not have the same exact numbering scheme as at the sales counter since the handheld computer is not creating a ticket in CylTech 2 or using the same numbering scheme. There is an option to enter a beginning order number series on the handheld. When doing this, it's a good idea to make the alpha prefix represent the handheld name (operator). If all of my dock tickets began with DK, as an example, I would know just by looking at the number that the ticket was started on the dock. Once the starting ticket number is entered, the handheld will automatically increment each time a ticket is

added (much like the numbering system in CylTech 2). Tickets created at the dock will be easily identified, but they will not fall in sequence with your counter tickets. ***If you want all ticket numbers to be sequential, you will need to start the process at the sales counter.**

Something else to take into consideration is how cash (if any) will be handled. If all sales are entered as delivery tickets or on account sales, this will not be an issue. If cash or credit cards are involved, then it would be better to start the process at the sales counter.

Also, while this method is more suited for handling cylinder transactions, it does not eliminate the possibility of selling hard goods at the dock as long as the money issue described earlier is taken into consideration.

Starting the Process at the Sales Counter

When the process is started at the sales counter, there is an added advantage of being able to handle any type of transaction including cash, check or credit cards. These transactions could be handled at the dock, but many distributors prefer to not deal with additional cash drawers on the dock.

In this example, the customer would come to the sales counter, indicate how many empty cylinders were being dropped off and how many full cylinders they wanted to pick up. They would also purchase any hard good items they wanted. The ticket would be handled just like it is now. Once the ticket was finished, the customer would take the ticket and go to the dock where they would unload their empty cylinders and load their full cylinders.

Using the handheld computer, you would enter the order number, customer number, the cylinders returned, the cylinders loaded and then print a receipt for the customer

using a blue tooth printer. **Note:** In this example, the billing has already been completed so the person on the dock is only capturing empty cylinders returned and full cylinders shipped.

The printed receipt could then be stapled to the ticket as proof of delivery. In the examples discussed, the customer would sign on the handheld computer and the signature would be captured for proof of delivery.

Printing Serial Numbers on the Invoice

If you choose to use the Palm Order Pad (handheld invoicing) at the dock, the serial numbers will be on the receipt given to the customer. If the process is started at the sales counter, then the serial numbers will be printed on the receipt attached to the delivery document or invoice.

Regardless of the method used, if an invoice is sent out to the customer, then the serial numbers for the cylinders returned and picked up **can be printed** on the daily invoice and the cylinder rental invoice.

Synchronizing the Handhelds

The handheld computers should be synchronized once a day and this should be done at the end of the day.

Have Questions? Feel free to [Send us an Email](#), we welcome the questions!

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