

The Weekly Catch

ANNOUNCEMENT: "Received Orders" will be changing to "Sales Orders" in February

Invoice Editing, Direct Order-to-Invoice Relationships, and More!

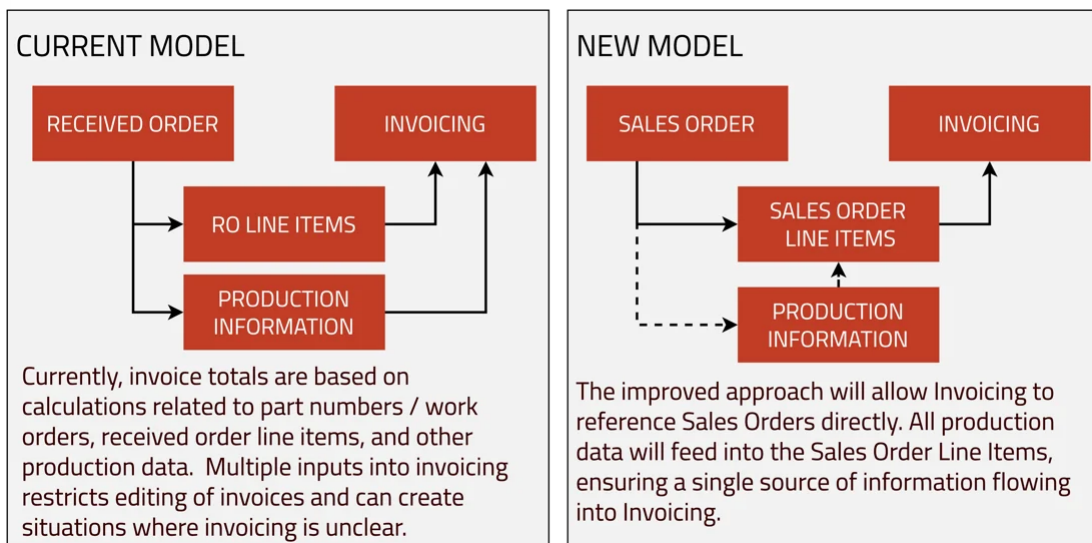
Over the months, we have heard that Order Entry and Invoicing are pain points in using Steelhead. To address this, we have taken on a major technical overhaul to order creation and invoicing. In February, we will be moving from our current model to a new structure that will retire "Received Orders" and introduce new and improved "**Sales Orders**."

Sales Orders in Steelhead are the work that you agree to do for a customer, with an associated price. Sales Orders include line items for part numbers and/or charges for things like expedite fees, environmental fees, and minimum lot charges.



There are a few major advantages to this approach. These include:

- Sales Order Line Items can be compared directly to Invoice line items, ensuring that no parts or other line items go uninvoiced.
- Line items will be marked complete at invoicing, providing total control and visibility to the business office.
- Invoices can now be edited after they are created, before being synced - no more voiding and recreating.
- Because invoicing will no longer be reliant on production data, it will be easier to separate production and business office workflows.
 - Sales Orders can be created without work orders. You will no longer need to create work orders for parts that have not yet arrived.
 - The front office will no longer need to create work orders - they can operate fully in handling only Sales Orders and Invoices.



Sales Orders will make Order Entry more flexible, and Invoicing easier. More information will be forthcoming in the next few weeks.

This change will drastically improve Steelhead for users who enter orders or invoice customers. More details (including screenshots and documentation) will be available in the weeks leading up to the change. You will also have the option to try out the new workflow in a testing environment prior to go-live, if desired.

We hope you're as excited as we are about these long-awaited improvements. Please contact us at support@gosteelhead.com with any questions or comments.

Highlighted Updates

Device Login Sessions Expire

- Logins on each device now expire after 30 days
- Users will be required to log in with email and password or PIN after their login session expires
- Replaces session-based login which could potentially be reset if cookies were cleared

Native Reporting: Insights are Here!

- Insights are the home of Native Reports (as opposed to custom reports)
- Insights offer improved performance, reliability, filtering, and graphs
- 3 reports currently available - many more to be added in the coming months

VIEW ALL PRODUCT UPDATES

Upcoming Webinars

Want to learn more about Steelhead's software or our latest features and functionality? Look no further than our monthly webinars!

Monthly Masterclass

Ready to take a deeper dive into the features and functionality within Steelhead's plant operating platform? The January Masterclass will focus on **Quality Management** in Steelhead, perfect for Steelhead Champions, current users, and organizations exploring the power of Steelhead.

Save your spot now.

Wednesday, January 31st

Noon to 12:45 CST

REGISTER NOW

The image is a promotional graphic for a webinar. On the left, there is a red and white graphic overlay. The top part is red with the Steelhead Technologies logo (a stylized 'S' and 'T' in a circle) and the text 'STEELHEAD technologies'. Below that, in white text on a red background, it says 'MONTHLY MASTERCLASS' and 'WEBINAR'. At the bottom of the red section, on a white background, it says 'Explore a new or featured tool in our plant operating platform. Both current and future Steelhead users are welcome to join this deep dive!'. The right side of the image shows a photograph of a group of about 15 people standing in a large industrial warehouse. They are dressed in casual work clothes. In the background, there are stacks of wooden pallets, a yellow forklift, and various industrial equipment.

Move Parts, Not Paper Live Demo

Join our brief, live demo, hosted in a casual environment with other like-minded attendees to get a high-level understanding of the opportunities within Steelhead's job shop software in addition to how you stack up against your competition.

Register to attend.

Thursday, February 1st

Noon to 12:30 CST

REGISTER NOW



MOVE PARTS NOT PAPER

LIVE DEMO

Explore industry benchmarks and the plant operating system designed for metal finishers so you can see how you stack up against your competition.



Upcoming Events

Florida Finishers Conference

Steelhead Technologies will be joining the group of experts at the Annual Florida Finishers Conference in Safety Harbor, Florida next week. Don't miss Chet's presentation on how to optimize operations with existing data and learn about updated industry benchmarks.

[LEARN MORE](#)



TECHNICAL PRESENTATION

Optimizing Operations with Automation

Chet Halonen, Sales Engineer

Thursday, January 25th at 3:00 PM



Shop Spotlight

Precise Powder Coating

Precise Powder Coatings, based in Salt Lake City, Utah, operates as a batch powder coater with around 20 employees, a workforce set to expand as they move to a new facility. Facing challenges in order entry, inventory management, job tracking, and a lack of job costing abilities, the company sought a solution to streamline operations and enhance visibility across its processes.



Precise Powder Coatings encountered several pain points with their manual processes, including cumbersome, redundant order entry.

Jesse, the Operations Manager overseeing plant operations, spent excessive time each day entering purchase orders manually, a task significantly reduced to just an hour with Steelhead. "I have about 20 POs open on one screen," explains Jesse. "It would have taken me 4 hours, generously (more like 5 or 6)."

Read the full story on our website...

READ THE FULL STORY

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