The Weekly Catch

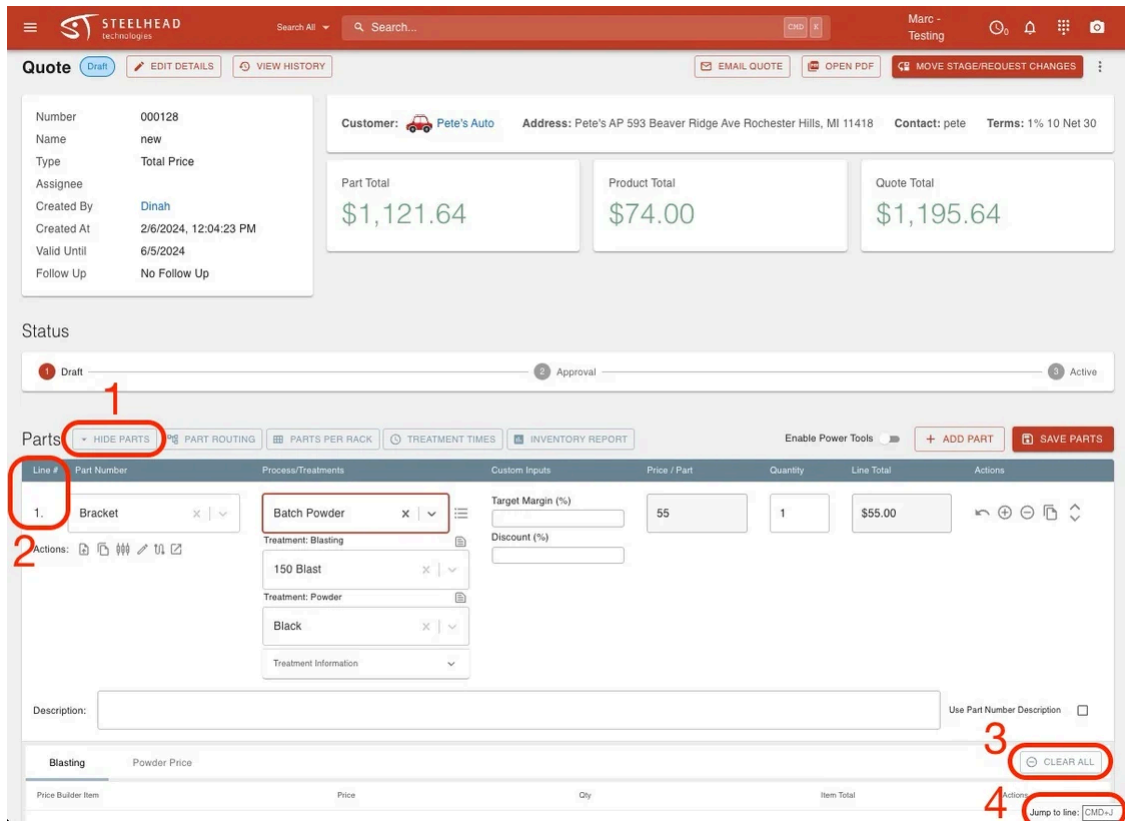## Sales Order Update: Changes to Quoting

Quoting Performance Updates Support Upcoming Sales Order Enhancements

On Monday evening (2/5/2024), Steelhead released a major update to the Quoting module in support of the upcoming Received Order --> Sales Order efforts. Among other changes, the performance and speed of the Quoting module has been drastically improved.

The Quoting update primarily improves Quoting performance and back-end changes in support of the Sales Order efforts, but we've also made some improvements to the functionality of the page. Read on below for details!

In addition to the improved speed of the Quoting page, we've also made some adjustments based on your feedback to improve the Quoting experience in Steelhead.

- **HIDE PARTS:** this button hides all parts entered on the quote so that it's easier to reach features found beneath the parts table. This is useful for quotes with large numbers of parts.
- **LINE #:** A new column on the parts table that identifies the line item for the parts. This is a crucial piece that will enable a seamless workflow between Quoting, Sales Order, and Invoice line items.
- **CLEAR ALL:** Clears all Price Builder items.
- **JUMP TO LINE:** Command + J + [line number] will allow you to instantly jump to whichever quoted line item you want to adjust without having to scroll and search.

The Sales Order update is scheduled for release in the week of February 19th, 2024. In the week of February 12th, you will have the option to test the changes

for yourself prior to release. The Sales Order update changes will include:

- The ability to create Sales Orders with Sales Order Line Items, without Work Orders
- The ability to associate parts with Sales Order Line Items after Sales Order creation
- The ability to edit and rearrange Sales Orders, and associating previously entered line items with parts
- Direct relationship between Sales Order Line Items and Invoice Line Items

Please contact support@gosteelhead.com if you would like access to the testing environment prior to the update to see how the new Sales Order workflow will work for your team!

Top Shops 2024 Now Available!

Apply Today: 2024 Top Shop from Products Finishing Magazine

Steelhead is thrilled to sponsor the 2024 Top Shops award by Products Finishing Magazine and Gardner Business Media (tag both), aligning our commitment to elevating the job shop industry.

What is the Top Shops Award?

This prestigious accolade recognizes outstanding performance in product quality, on-time delivery, and exceptional customer service within the job shop manufacturing sector. This is an accomplishment job shops can leverage to win new business and stand out against their competition.

Criteria for Consideration

To be considered, companies must meet stringent criteria, showcasing dedication to delivering exceptional products and services.

Top Shops Survey

The survey is open for submissions until March 31st, 2024. Winners will be announced in the July (Plating & Anodizing) and September (Liquid & Powder Coating) issues.

Plating & Anodizing Job Shops

Liquid, Powder & Electrocoating Job Shops

Highlighted Updates

Force Logout Returns to Login Page

- After a session is timed out, the device is returned to the Login page immediately
- Force Logout can be configured either by device or globally from Domain Settings

Timesheet Enhancements

- Missed Clock Entries will generate a warning banner on the Payroll Report page
- Timesheet Domain Settings for "Timesheets Requiring Review" and Timesheet Break Times"
- User-specific Allocation Time Off settings

Upcoming Webinars

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

Steelhead Masterclass: Digital Certs + Specs

Steelhead Technologies will be showcasing how simple it is to manage digital certs and specs in Steelhead's job shop software. Join us and come ready with your questions. If we have interest and time, we will also showcase the NADCAP Scanner to show how simple it is to leverage Steelhead's cutting-edge technology to save hours in cert management, daily.

Wednesday, February 21st

Noon - 12:45 CST

REGISTER NOW

Move Parts, Not Paper Live Demo

Join our brief group 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, March 7th
Noon to 12:30 CST

REGISTER NOW

Upcoming Events

Powder Coating Week 2024

We are looking forward to hosting demonstrations of Steelhead's plant operating platform on the show floor at Powder Coating Week 2024!

We will also be hosting a dinner on Tuesday, March 12th at 7:00 PM after the exhibition closes for interested folks to meet current Steelhead customers and learn more about their experiences using the platform in a casual setting.

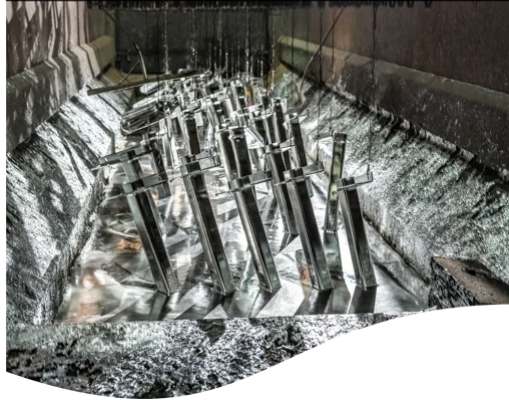**Interested in joining us?** Reach out to us today by emailing sales@gosteelhead.com for more information.

New Articles

The year ahead brings endless opportunities to job shops with the right perspective and strategy. Learn more in our latest articles:

GALVANIZING SOFTWARE'S IMPACT ON PRODUCTION MANAGEMENT

Shop Spotlight

Sapphire Metal Finishing

Sapphire Metal Finishing, based in Caldwell, Idaho, faced a significant challenge with its old ERP system. After enduring a **two-year-long struggle with an unsuccessful deployment from their incumbent ERP**, frustration had reached a breaking point.

Dwayne, the owner, decided to terminate the incumbent ERP's deployment team and initiated a search for a more reliable solution for their anodizing and powder coating operations. The request for a demo of Steelhead's plant operating platform designed specifically to manage the ins and outs of the anodizing and powder coating processes, was submitted at 2:00 am and the Steelhead team was reaching out just a few hours later.

The deployment with Steelhead, led by Sapphire's knowledgeable and capable team, was remarkably different than their previous experience. Before the on-site implementation visit, the team had already familiarized themselves with Steelhead, ensuring a smooth and efficient ERP transition. Steelhead's purpose-built system and user-friendly interface significantly contributed to the lightning-fast deployment timeline, completing the transition in just seven weeks.

Sapphire Metal Finishing sought help with:

- Traceability
- Shipping & Receiving
- Updated QMS

Working diligently with Steelhead's deployment team, Sapphire Metal Finishing quickly experienced significant benefits, including, but not limited to:

- Scanner Line Accuracy & Efficiency
- Effortless Reporting
- Order Entry & Power Quoting
- Streamlined QMS & Production Workboards
- Sensor Dashboard
- Flexible Solutions
- Lightning-Fast Deployment
- Solid Return on Investment

"We used to spend 8-10 hours every month creating reports and we love that Insights wipes out this need." - Dwayne, President of Sapphire Metal Finishing

...read more about their story on our website.

READ THE FULL STORY

PROUD PARTNER OF

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