



Email Customization Coming Soon

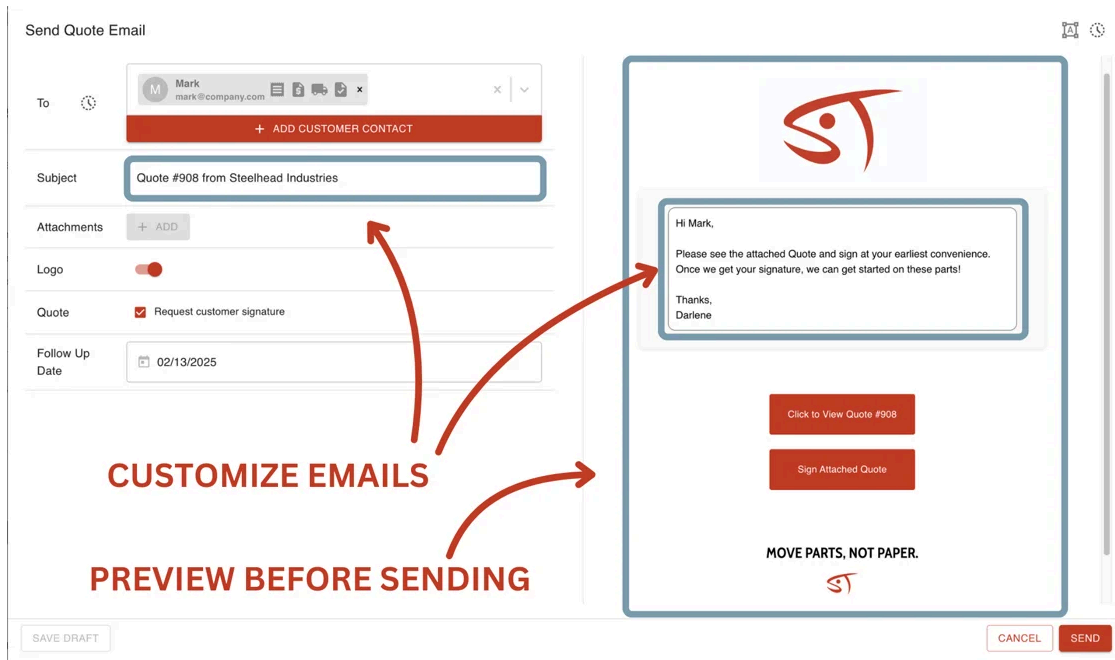
A few updates to email functionality in Steelhead will be getting released this weekend. These updates will grant the user improved customization and tracking when sending emails from Steelhead.

[See the video below:](#)



When composing an email, you'll now have the ability to customize it to your needs.

- Select any Contacts you'd like to send the email to
- Add a new Customer Contact right from the Email dialog box
- Change your Subject Line as desired
- Choose whether you want your company logo included in the email
- Add or remove Request Signature button

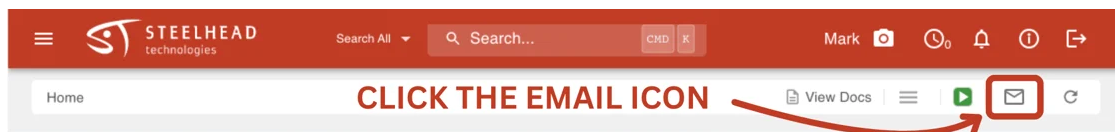


You can also see a history of emails that have been sent and received for each Steelhead entity. For example, this Quote #908 for Acme Industrial had two emails sent, and no replies yet.

Sent At	Creator	Recipients	Preview
2/7/2025, 7:49:47 AM	mark@steelhead.com	plegden@gmail.com	Delivered
2/7/2025, 11:30:25 AM	mark@steelhead.com	Mark <mark@company.com>	Sent

If you'd like further email capabilities to accelerate your sales even more, gain access to the integrated CRM solutions by reaching out to us at upgrade@gosteelhead.com.

With access to the full email dashboard, click the global Email icon in the upper right corner of any page.

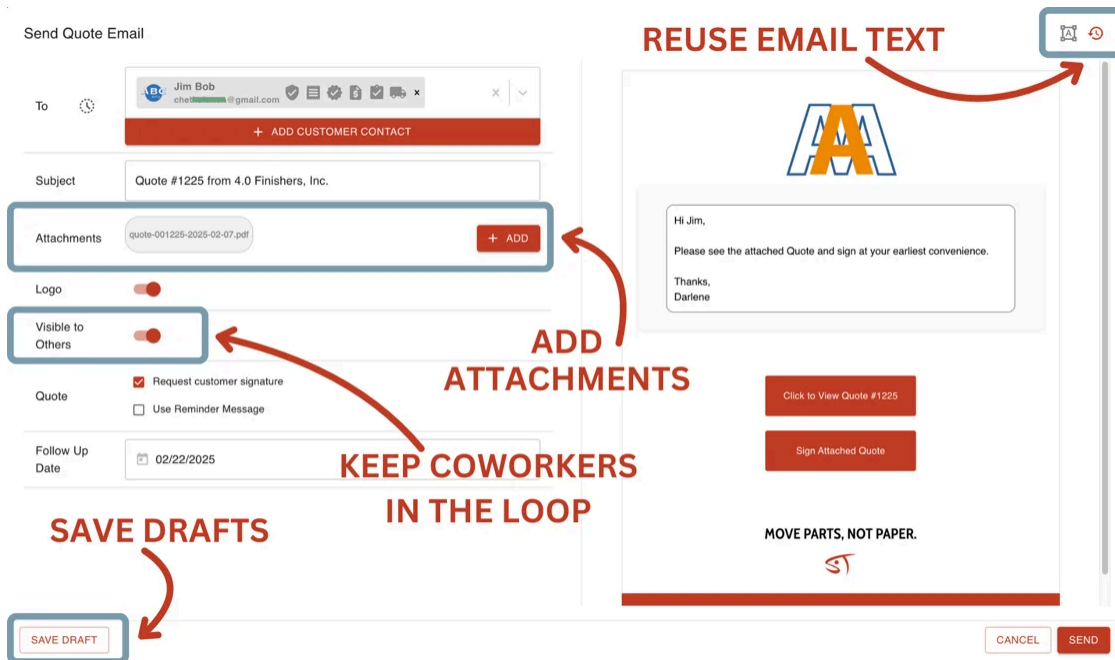


See the full Email capabilities [in the video below](#):



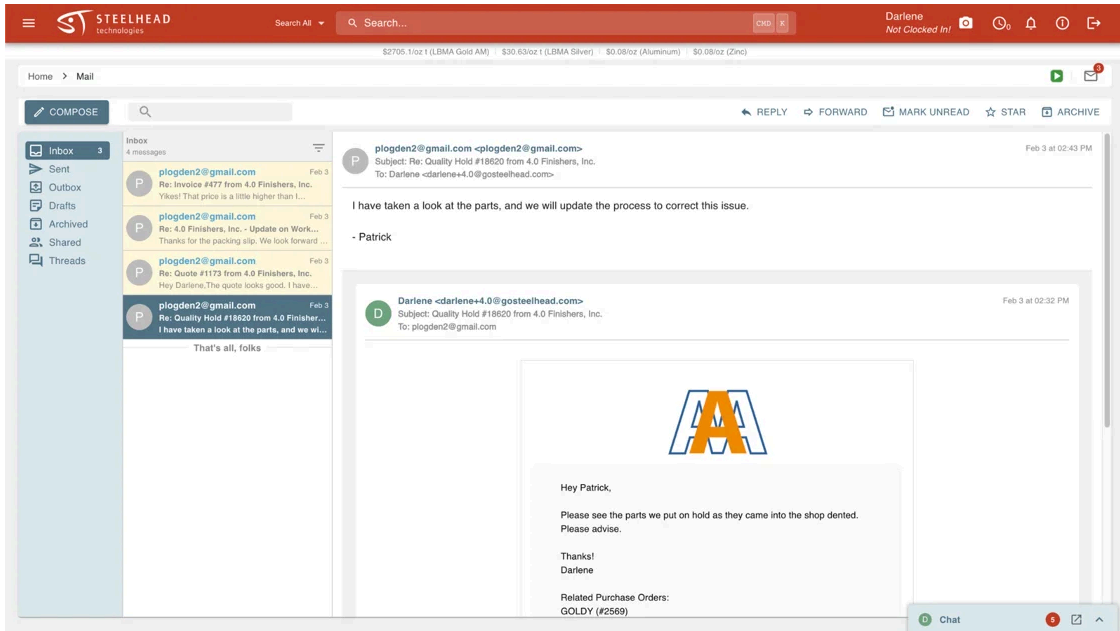
With Steelhead's CRM Solution, you'll have a few added abilities when sending emails within the email dialog box:

- Reuse email text so you don't have to re-type the same text over and over
- Add any attachments to any email
- Toggle on "Visible to Others" to keep coworkers in the loop
- Save drafts and come back to them later



You'll also gain access to the full Email dashboard within Steelhead. Here, you will also be able to:

- Send and Receive emails directly from your Email dashboard
 - Steelhead Mail Inbox only shows you emails from 1.) Other Steelhead Users and 2.) Direct replies to emails you sent out from Steelhead, meaning your inbox should always be **spam-free**
- Reply to, Forward, Mark Unread, Star, Archive, and Delete emails
- Filter and search emails in your email dashboard
- View Shared emails



These updates are designed to improve the workflow when sending and receiving emails within Steelhead and to help you run your shop more efficiently.

Email upgrade@gosteelhead.com if you're interested in gaining access to the full email dashboard and CRM capabilities.

Steelhead Technologies, 100 5th Street, Suite 2, Calumet, MI 49913, United States

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