



## Win More Business With The Best Service:

# Introducing the New Steelhead Customer Portal!

### Coming Soon: Improved Portal Experience with Marketing,

#### Branding, and Security Enhancements

With the upcoming Customer Portal enhancements, you'll be empowered to provide your customers with a premium service experience, while also reducing the amount of time you spend answering phone calls and responding to emails.

With this update, you will gain:

- The ability to add your logo and customize the primary and secondary colors, making the Portal more of a white glove experience for your customers
- Ability to publish announcements which will be posted for all of your customers to see within their Customer Portal
- To better protect the data in your Customer Portal, viewers will now have individual credentials to log in
- A clean, updated look

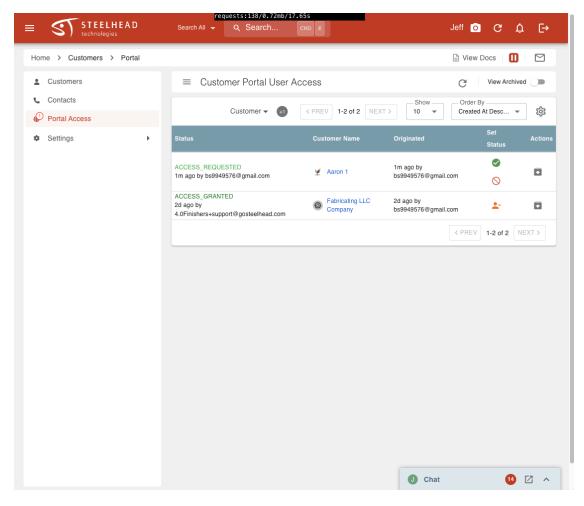
Customer Portal Update Coming Feb 22/23! Weekly Product Updates & Company News from the Steelhead Team

| me                         |                              |                                  |  |   |                           |  |                      |                |   |
|----------------------------|------------------------------|----------------------------------|--|---|---------------------------|--|----------------------|----------------|---|
| will be closed Saturday    | y, February, 15th. Thank you | u for your busin                 | ess and have                           | a great wee                               | kend!                     |  |                      |                |   |
| Quotes                     |                              | Purchase Orders                  |  |   | Pos Watch Tower           |  |                      |                |   |
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| #001255 #1                 | Aluminum Tube 6 7/8 x 1      | 234 2/14/2025, 3:51:02 PM 2/20/2 |  |   | 2/20/2025                 | Rail 1   |                      |                |   |
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| #001256 #1                 |                              | 43865                            | 43865 2/14/2025, 3:52:15 PM            |   |                           | Slide 1  |                      |                |   |
|                            |                              | 3897                             | 3897 2/14/2025, 3:52:54 PM             |   |                           | Parts are Received Parts ready for Billing                           |                      |                |   |
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|                            | _                            |                                  |  |   |                           | X 2' X 7'  |                      | ts ready for   | Billing                                     |
|                            | Total Quotes <b>3</b>        |                                  |  |   | Open POs 5                |  | Par                  | up / Delivery  | Billing                                     |
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Customize the look and feel of your Customer Portal with your own branding and color scheme!

Rather than sending your customers a link to view their Portals, granting access will now only require a few clicks. When the initial view request arrives, you'll receive a notification in Steelhead. Just click "approve" once, and your customer will have all the information they need to fully self-serve.

As before, you have complete control over what appears in your portal and whether to grant accounts access. Since Portal viewers will begin logging in rather than following an emailed link, the data in your Portal will be more secure.



Grant your customers access to self-service visibility on their jobs with just a few clicks (and no typing). Access can be granted or rescinded at any time.

This update is scheduled for release over the weekend on February 22nd / 23rd. Watch your inbox for video demos and user guides coming this week.

Reach out to us at <a href="mailto:support@gosteelhead.com">support@gosteelhead.com</a> with any questions!

## **Elevate Your Equipment Management**

Improve the way you manage your equipment with Steelhead! Join our masterclass on Wednesday, February 6th at 12pm. In this live webinar, you'll learn about:

- · Creating maintenance plans and events
- Adding new equipment and reviewing maintenance nodes
- Exploring sensor dashboards and new sensors



**REGISTER NOW!** 

# **Product Update Highlights**

#### **SO/WO Deadlines**

On Work Orders, Sales Order and Work Order deadlines are both visible to help with differing timelines.

### **Employment History**

Provides improved tracking of employment history for everyone in your company.

**VIEW ALL PRODUCT UPDATES** 

These updates are designed to help you save time and have your shop running more efficiently.

Please email us at <a href="mailto:support@gosteelhead.com">support@gosteelhead.com</a> with any questions!

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