



STEELHEAD

technologies

SALES ORDER UPDATE RELEASE: 2/25/2024

Hello everyone,

The Sales Order update will be released on 2/25/2024. This slight adjustment from our originally release date of 2/23/2024 will provide additional time for Quality Assurance efforts and final adjustments to the User Interface.

The screenshot displays the 'SALES ORDER LINES' interface. At the top, there is a navigation bar with the Steelhead Technologies logo, a search bar, and the user name 'Marc - Testing'. Below the navigation bar, there are buttons for '+ ADD LINE', '+ ADD QUOTED LINES', and 'SAVE LINES'. The main content area is titled 'SALES ORDER LINES' and contains a table for 'Line Items'. The table has columns for 'Product', 'Description', 'Quantity', 'Price/Unit', 'Unit', and 'Actions'. A single line item is visible with 'General' in both Product and Description columns, a quantity of 10, and a price/unit of \$24.00. The unit is 'ea'. There are also buttons for '+ ADD LINE' and 'HIDE LINES'.

The Sales Order page, which replaces the Received Order page, includes a table for Sales Order Lines. Invoiced line items will be directly related to Sales Order lines.

As a reminder, the Sales Order update will replace "Received Orders" with "Sales Orders," and will include substantial changes to order handling and Invoicing.

Home > Invoices

Choose a Sales Order to Invoice

Sales Orders SALES ORDERS PACKING SLIPS SORT NEWEST TO OLDEST

Filter: Status Customer Sales Order Work Order Part Number CREATE INVOICE

Kangas Part Shop
Sales Order: #669
Lines Closed 0/1

Parts in Process (100%) Ready to Invoice (100%) Invoiced (0%)

Sales Order Lines Part View

Line #	Product	Price	Qty	Total	Actions	Invoice Status
<input type="checkbox"/> Line #1 14" Rim Total: \$240.00 Invoiced: \$0.00	General	\$24.00	10	\$240.00	Close	\$0.00 0%

The Invoicing page will reflect Sales Order lines directly, improving visibility and workflow efficiency. Invoices will be editable prior to syncing to accounting.

The Sales Order update will include the addition of Sales Order Lines on Sales Orders. Invoice Line Items will be directly related to Sales Order lines. Some of the benefits of this update will include:

- Making other workflows around Quoting --> Order Entry --> Invoicing possible
- Improved visibility on Invoiced / Uninvoiced Sales Order Lines
- The ability to create Line-Item Only Sales Orders, with no work order or part number information
- The ability to edit invoices prior to syncing to accounting

If you have questions or feedback for us, please reach out at support@gosteelhead.com. Thank you!