



STEELHEAD

technologies

SALES ORDERS HAVE BEEN RELEASED!

Hello everyone,

The Sales Order update was released early in the evening on 2/25/2024. The Sales Order update includes major adjustments and improvements to Order Entry and Invoicing.

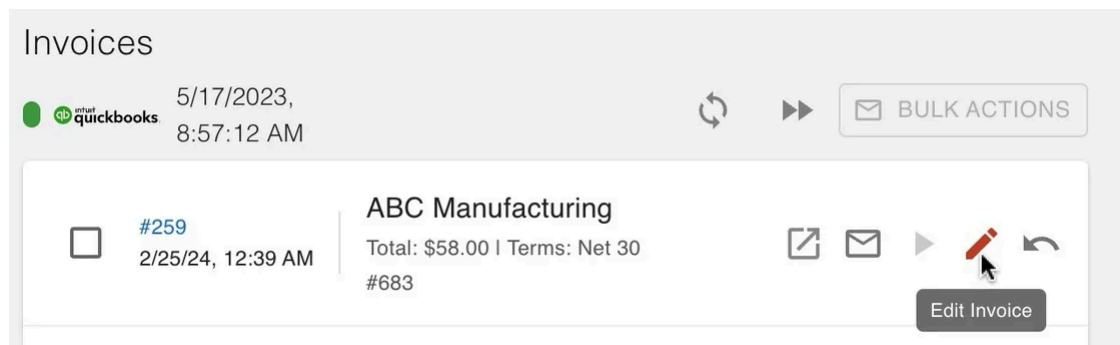
The screenshot displays the Steelhead Technologies software interface. At the top, there is a navigation bar with the company logo, a search bar, and a dropdown menu. Below this, a breadcrumb trail shows 'Home > Invoices'. A section titled 'Choose a Sales Order to Invoice' is followed by a 'Sales Orders' section with tabs for 'SALES ORDERS', 'PACKING SLIPS', and 'UN-PRICED PARTS'. A filter bar includes 'Status', 'Customer', 'Sales Order', 'Work Order', and 'Part Number'. A 'CREATE INVOICE' button is also present. The main content area shows a sales order for 'ABC Manufacturing' with 'Sales Order: #683'. A progress bar indicates 'Total Invoiced: \$87.00 / \$116.00'. Below this, three status bars are shown: 'Open - Received (100%)', 'Open - Ready (25%)', and 'Open - Invoiced (75%)'. The 'Sales Order Lines' section is displayed with a 'Part View' toggle. It contains two lines: 'Line #1' for '17" Aluminum Wheel' and 'Line #2' for '3" Bolts'. Each line has a table with columns for Product, Price, Sales Order Line Qty, Parts Open - Ready, Total, Actions, and % of Sales Order Line Invoiced.

Product	Price	Sales Order Line Qty	Parts Open - Ready	Total	Actions	% of Sales Order Line Invoiced	
17" Aluminum Wheel	General	\$25.00	4	4	\$100.00	Close	\$75.00 / 75%
3" Bolts	General	\$1.00	16	16	\$16.00	Close	\$12.00 / 75%

The Invoicing page will reflect Sales Order lines directly, improving visibility and workflow efficiency. Easily see what has been invoiced and what is still pending.

The next time you log in, you'll see the following changes in Steelhead:

- "Received Orders" are now called "Sales Orders" throughout the platform
- Other workflows around Quoting --> Order Entry --> Invoicing are now possible
- Sales Orders include Sales Order Line Items, which are directly related to Invoice Line Items when creating Invoices
- Improved visibility on Invoiced / Uninvoiced Sales Order Lines
- You can now create Line-Item Only Sales Orders, with no work order or part number information
- You can now edit invoices prior to syncing to accounting



Easily edit invoices prior to syncing them to accounting. Because Invoice Line Items are directly linked to Sales Order Lines, adjusted part counts on edited invoiced will automatically adjust Sales Order Line Item quantities as well.

A few notes from our Engineering, Deployment, and Customer Success teams regarding this update:

- **Invoice PDFs:** We have made adjustments to Invoice PDF templates to reflect these major structural changes in Invoicing.
 - Because all Invoiced Line Items are now related to Sales Order Line Items, work order and part number pricing have been removed from invoicing templates.
 - Please review your Invoicing templates and reach out to support@gosteelhead.com with any questions or adjustments. Please

closely monitor your invoice totals on PDFs for the next few days to make sure they are returning the expected results.

- **Other PDFs:** While Invoicing PDF templates were primarily affected by this update, other PDF templates may be in need of updating to reflect Sales Orders as opposed to Received Orders. Please review and adjust your templates as needed, and reach out to support@gosteelhead.com for any assistance needed.
- **Power Invoicing:** Our team has reviewed and adjusted all Power Invoicing configurations prior to release. If you are using Power Invoices, please monitor invoicing calculations for accuracy for the next few days to ensure that your calculations are functioning as expected.
- **Custom Reporting:** We have adjusted the vast majority of custom reports affected by these changes so that they will continue to function as before.
 - In cases where reports would be deprecated, we've reached out to let you know which (if any) reports have been archived with this update.
 - Please continue to monitor and validate your custom report results, especially those related to Invoicing, to ensure that they have not been affected.

Thank you to all who participated in beta testing this update prior to release - your feedback has been invaluable in our development and Quality Assurance efforts!

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