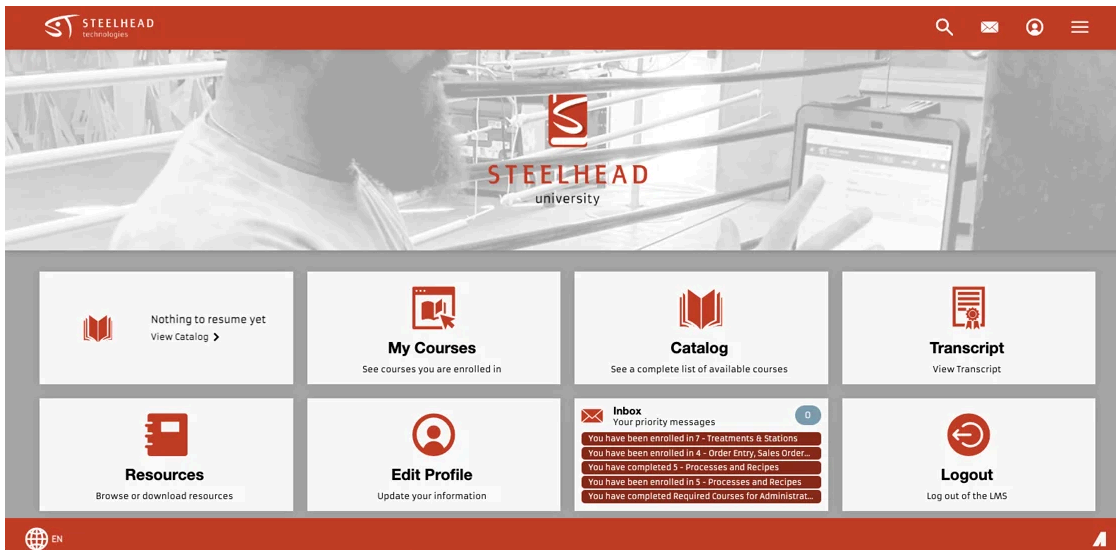# FRESH FEATURES

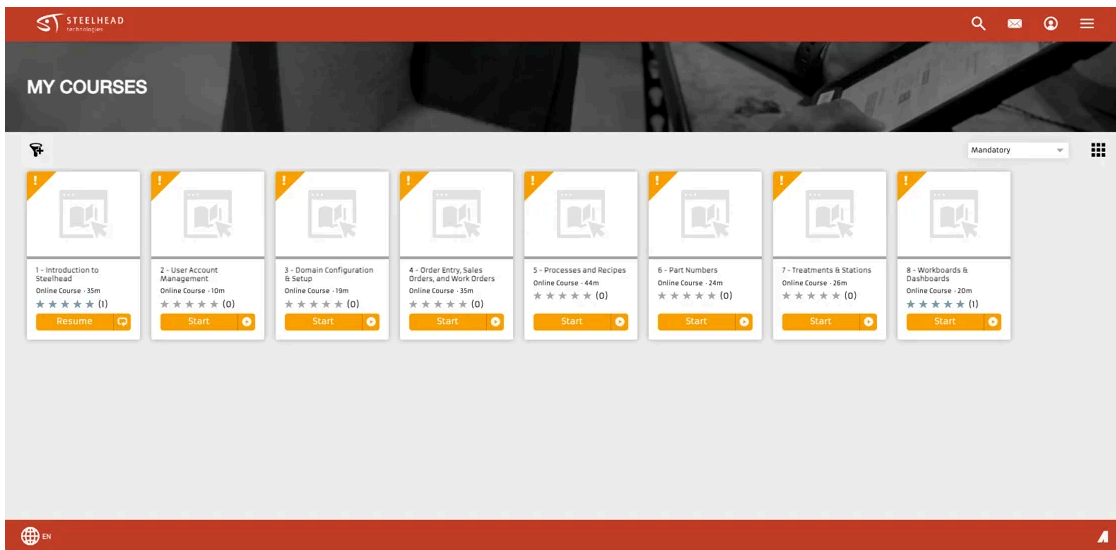# BI-WEEKLY PRODUCT UPDATES

Introducing Steelhead University!

Comprehensive Training to Quickly Ramp New Users and Employees

Grasp the basic concepts of Steelhead's software right away with Steelhead University! This new fully online training program includes eight core administrative courses, with specialization courses for advanced users to be added in the coming months. All Steelhead users are welcome to enroll, whether you're a new customer or a new employee of a company that's been using Steelhead for years.

The first eight courses were developed to introduce new users to Steelhead. These core courses provide a strong foundation in the structure of Steelhead. In the coming months, there will be a significant number of additional specialization courses added that will include specific capabilities like Scheduling, Job Costing, Reporting, and Timecards.

To enroll yourself or your team in Steelhead University, email learn@gosteelhead.com!

LEARN MORE ABOUT STEELHEAD UNIVERSITY

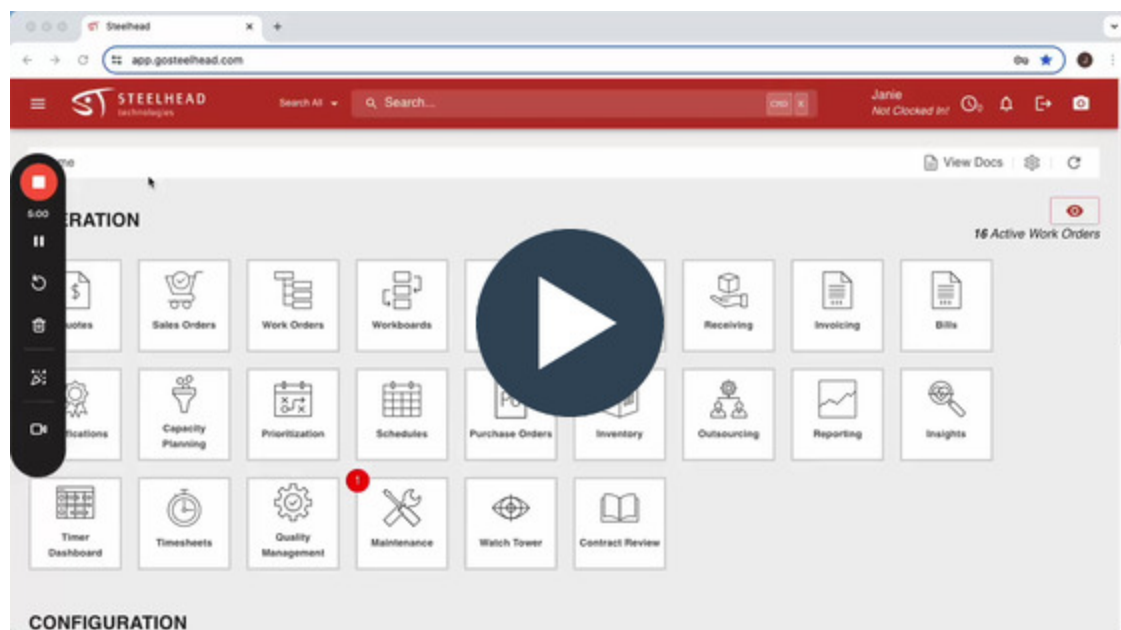# Reporting Update: Updated Insights and Faster Customizable Reporting!

Introducing Perspective tool, enhanced Insights reports, and a new custom reporting database

Steelhead has introduced a new reporting reporting tool that enables users to rearrange, sort, filter, format, and visualize reporting data! Instead of writing code to view your business analytics, Perspective allows users to group and chart their data in a user-friendly but advanced manner.

Perspective tool includes:

- Diagrams - create 12 different types of charts and graphs, including heatmaps, data grids, and sunbursts.
- The ability to rearrange, re-size, and format columns.
- The ability to group, split, sort, and filter report results.

Perspective is available to use in both native reporting (Insights) and on custom reports (if you have moved from SQLite to DuckDB).
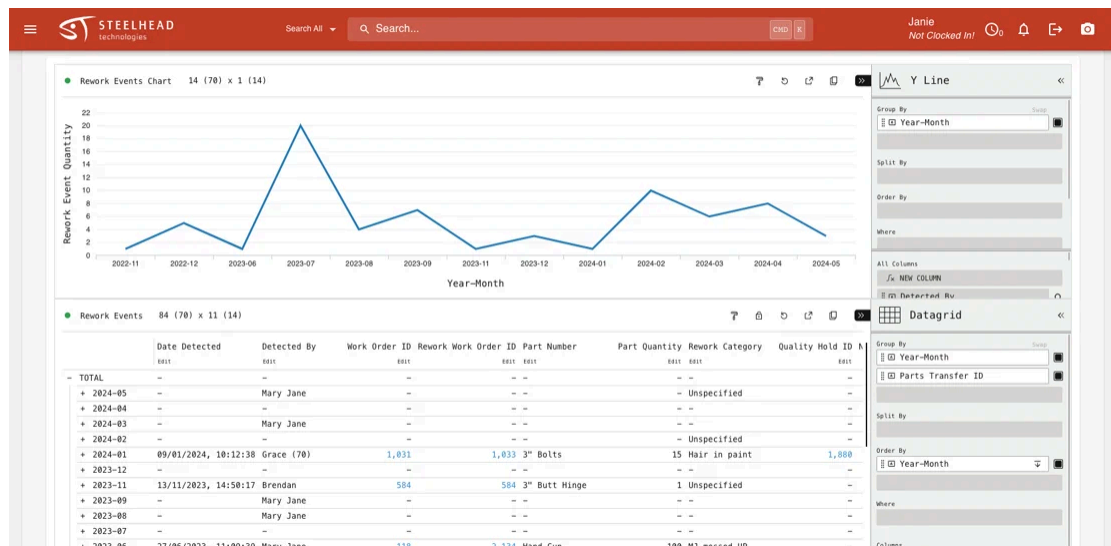

In addition to Perspective, seven new native reports have been added to the Insights page. These include:

- **Sales Order Backlog:** Shows information on active sales orders.

- **Transaction Summary:** Shows quote, sales order, and invoice totals based on creation date.
- **Invoice Reconciliation:** Shows invoice totals, including tax.
- **General Operation Count:** Shows the count of quotes, sales orders, work orders, and invoices created.
- **Inventory Creation Summary:** Shows an overview of all inventory creation.
- **Rework Event:** Shows rework event history.
- **Shipping Counts:** Shows the count of packing slips created, packing slips signed, bills of lading created, and shipments shipped.

With the Insights foundation laid, we will be adding more native reports continually each month. If you have an idea for a native report that you think would be valuable, please contact **support@gosteelhead.com** to let us know!

One other major update to reporting is our switch from SQLite (Reporting v1) to DuckDB (Reporting v2). DuckDB offers significantly improved performance on the custom reporting dashboard and edit view. To enable DuckDB, toggle on "Reporting 2" in the Domain Settings page.

If you currently have custom reports and have not switched to Reporting v2 yet, your SQLite reports will need to be re-written. To quicken the migration to the new platform, Steelhead's support team has been contacting accounts to ask which reports are being used and should be converted. Please make sure to check your inboxes and let us know which reports you'd like to move, so you can begin using DuckDB!
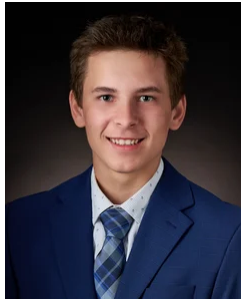
INTRODUCTIONS

Welcoming our newest team members!

CARL LEUKEMA

Customer Success Manager

LANDON BEKKALA

Deployment Specialist

SUZY LINNA

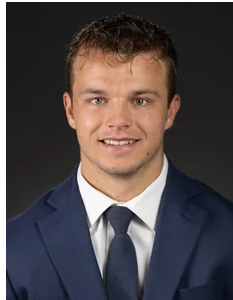*Customer Support Specialist*

TIM HALONEN

Deployment Specialist

DAVID STORM

Sales Engineer

WES JOHNSON

Deployment Leader

PROUD PARTNER OF