



NEWS AND PRODUCT UPDATES

Office Hours Update!

Steelhead closed July 4th and 5th

The Steelhead office will be shut down for the fourth and fifth of July. Response times may be delayed while our team is enjoying the summer holiday. **Happy**

Fourth of July!



New Shipping Enhancement—Drop Shipping!

Bypass shipping to your customer and send orders directly to *their* customers

Steelhead now offers the ability to drop ship orders by selecting the "Drop Ship?" field during order entry or shipping. When you select "Drop Ship?", additional customer drop downs populate to provide further shipping information.

- Set up drop ship Domain setting to use this tool.
- Select "Drop Ship?" field while creating a Sales Order, packing slip, or bill of lading.
- Contacts are distinguished between original and drop ship customer.
- Bill of lading third party freight charges can be billed to the customer.

The image shows a screenshot of a web application interface for creating a sales order. The form is titled "Create Sales Order" and contains several input fields and a checkbox. A red rectangular box highlights the "Drop Ship?" checkbox, which is checked. The form fields include:

- Type: MAKE_TO_ORDER
- PO #: Leave blank if no PO# or PO Name
- Customer: ABC Manufacturing (#6)
- Contact: Arnold Burns
- Bill To: 101 Cannon St Anchorage AK 99501
- Drop Ship?
- Customer: XYZ Technology
- Ship To: 45873 E Broughton St Savannah , GA 31
- Ship Via: Select...
- Invoice Terms: Net 30
- Deadline: 07/08/2024


At the bottom of the form, there are three buttons: "SAVE", "CANCEL", and "SAVE + ADD PARTS".

Additional Steelhead University Courses Published!


***Specs & Certifications, Shipping, and File Management* courses are now available in SHU**




Learn how to best utilize your Steelhead package and features by taking the *Specs & Certifications, Shipping, and File Management* modules in Steelhead U. You will discover spec driven processing, containerizing, and file attachment types that can enhance your Steelhead experience. Once you have completed the required core curriculum of courses, self-enroll in any specialization courses that you wish to become an expert in.


- Initial core curriculum courses are pre-requisites for all specialization courses.
- For customers that have already been deployed, all SHU courses are optional.

 STEELHEAD technologies


← SPECIALIZATIONS - REQUIRED FOR ONE PERSON PER ACCOUNT




 [Catalog](#) > Specializations - Required for one person per account

		
Invoicing Online Course - 34m ★ ★ ★ ★ ★ (0)	Quotes Online Course - 48m ★ ★ ★ ★ ★ (0)	Shipping Online Course - 22m ★ ★ ★ ★ ★ (0)
Enroll +	Enroll +	Enroll +

 STEELHEAD technologies

← SPECIALIZATIONS - OPTIONAL

 [Catalog](#) > Specializations - Optional

		
File Management Online Course ★ ★ ★ ★ ★ (0)	Scheduling Online Course - 29m ★ ★ ★ ★ ★ (0)	Specs & Certifications Online Course ★ ★ ★ ★ ★ (0)
Enroll +	Enroll +	Enroll +

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

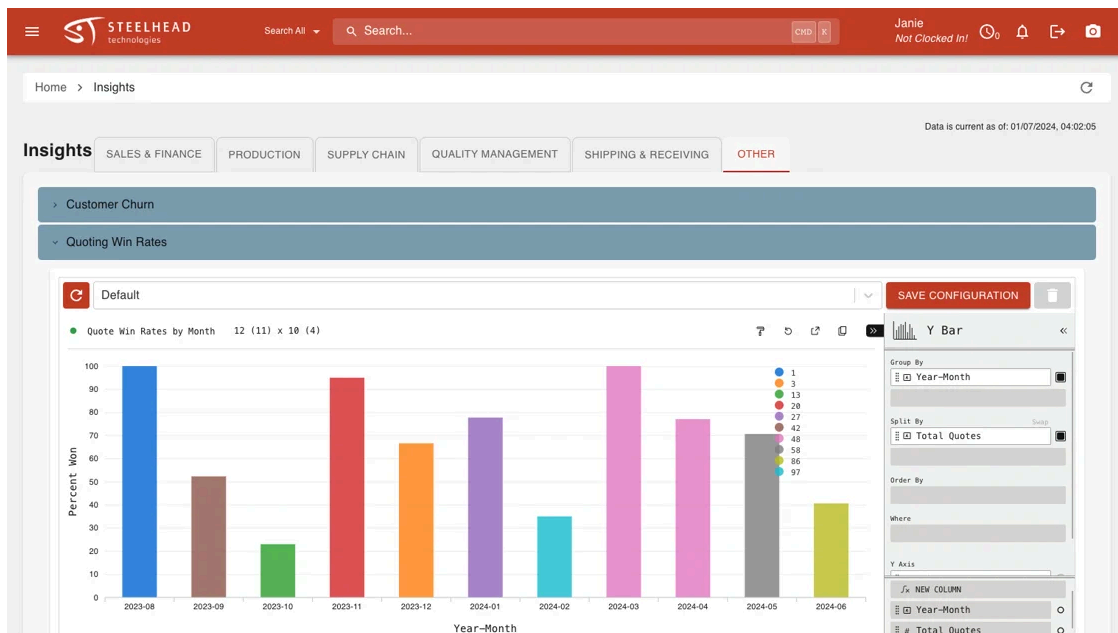
Six New Insights Reports!

Track more data with six additional Insights reports

Insights allows you to configure graphs and charts to analyze your shop's data in personalized way. Now, use Insights ever expanding offerings to understand and track your shop's data over time. The new Insights reports are as follows:

- **Processed Parts**

- This report shows parts that are processed.
- A part is considered "processed" when it is transferred from a process node that is tagged with the "Parts Processed Tag".
- **Rack Throughput (Digital)**
 - This report shows racks that have been processed.
 - Digital racking involves racking parts within the Steelhead software.
- **Rack Throughput (Analog)**
 - This report shows racks that have been processed.
 - Analog racking does not involve racking parts manually within the Steelhead software. Instead, Part Numbers with parts per rack set on a rack type are assumed to have been racked.
- **NCR Overview**
 - This report shows an overview of Nonconformance Reports creation.
- **Shipped Parts**
 - This report shows an overview of parts that have been shipped.
- **Quoting Win Rates**
 - This report shows the rate at which quotes are won.
 - A quote is won if a sales order has been created against it.



Product Update Highlights!

New Invoice Terms Option

Can set default to "Payment Required to Ship" which provides a warning on the Shipping dashboard!

New Icons on Steelhead Homescreen

Bills, Contract Review, Product Categories, Carriers, Trucks, Uploaded Files, Integrations, and Product Updates tiles all have new icons!

Blanket Sales Order Setting

Allows you to create a Blanket Sales Order which is used long-term and will not close when the line-items close!

Quotes Can Be Created From Part Number Prices

By simply clicking on the three dot menu next to your Part Number price, you can create a quote!

[VIEW ALL PRODUCT UPDATES](#)

INTRODUCTIONS

Welcoming our newest team members!



GARRETT IMPOLA

Customer Success Manager



MARK WOODFORD
Software Engineer



ISAK HAATAJA
Sales Engineer



ELIZABETH HEINONEN
Customer Support Specialist



ISABEL MARKER
Deployment Leader

PROUD PARTNER OF



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

[Unsubscribe](#) [Manage preferences](#)