

## Update to Specs and Order Entry

Late on Wednesday, August 7th 2024, Steelhead released an update to specs. This update makes it possible to set spec parameters on specific process node occurrences.

## **IMPORTANT NOTE:**

This change will adjust the workflow to add specs to part numbers from the "Add Parts to Sales Order" dialog and the "Add Parts to Quote" screen.

| Add Parts to Sales Order CMD I for new part row                   | Add Parts to Sales Order CMD I for new part row                              |
|---|--|
| CMD     I     for new part row       Part Number     Part Options | CMD I for new part rowPart NumberPart Options                                |
| 3" Butt Hinge Is one-off Part #                                   | β" Butt Hinge × ✓ Is one-off Part #<br>↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ |
| OLD - ADD SPECS BUTTON  | VIEW SPECS. EDIT PN TO<br>EDIT SPECS.<br>NEW - CLICK "EDIT" TO ADD SPECS     |

To add a spec to a part number on the "Add Parts to Sales Order" dialog, click the "Edit" pencil icon on the part number.

| Parts HIDE PARTS PART ROUTING                     | Parts HIDE PARTS   |
|---|--|
| 1. 8" House Number x v                            | Line # Part Number   |
| Unit of Measure (optional)                        | Sales Orders: #2331 (1 parts)  |
| Select  | 1. 8" House Number 🕒 🕞 🖉 🕅 🖸   |
| Spec: / Set Specs on Part Number bend or burnish? | Spec: Adhesion Test - Did it bend o Edit Part Number/Add Specs           |
| OLD - SET SPECS<br>ON PART NUMBER<br>Description: | NEW - "EDIT PART NUMBER" BUTTON NOW INCLUDES "ADD SPECS"<br>Description: |

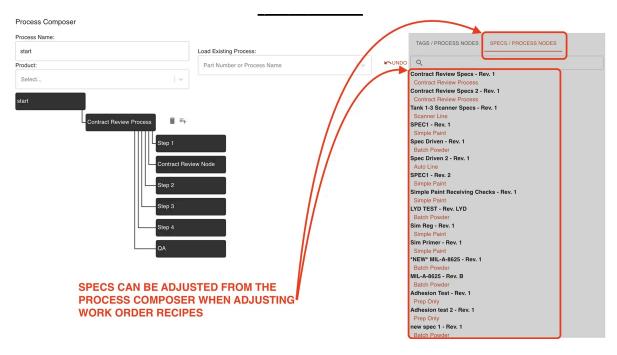
To add a spec to a part number on a quote, click on the "Edit Part Number / Add Specs" pencil icon.

Previously, it was necessary to open a second dialog box to set specs and params on part numbers. Now, this ability is included in the create / edit part dialog.

| Edit Part Number                                      |  |            |  |          |   |
|---|--|------------|--|----------|---|
| Name:   | Default Process: 0 COMPOSE             |            | Pricing:   | $\oplus$ | Custom Inputs A                                 |
| 3" Butt Hinge   | Batch Powder X                         |            | \$0.00 / unit<br>Quote: #000445 - Line 2                                     | :        |   |
| Accounting ID/Name:                                   | From: Part Number                      |            | Last Modified: 8/5/24, 1:30 PM   | •        | A newer schema is<br>available                  |
| 3" butt   | Configure Opt-In/Opt-Out               |            | \$0.75 / ea<br>Quote: #000426 - Line 1<br>Last Modified: 7/22/24, 2:54 PM    | :        | available                                       |
| Customer:   |  |            | \$0.00 / ea  |          |   |
| Chord Energy ×   ~                                    | From: Part Number (Cancels Others)     |            | Quote: #000397 - Line 1<br>Last Modified: 7/9/24, 3:38 PM                    | :        | Per Part Count Unit Definitions:<br>LBS / Part: |
| Part Number Group:                                    | Opt-in to Ready to Mask/Plug           |            | \$200.00 / ea<br>Quote: #000358 - Line 1<br>Last Modified: 6/24/24, 12:13 PM | :        | 12 /<br>Part                                    |
| Select 🗸  |  |            |  |          | Lbs / Part:                                     |
| Labels:   | Opt-out of Package                     |            | \$55.00 / ea<br>Quote: #000253 - Line 2<br>Last Modified: 5/2/24, 3:03 PM    | :        | /<br>Part                                       |
| Select 🗸 🕂  | Default Treatment Selections           |            | \$3.75 / ea  | :        |   |
| Tax Code:   |  |            | \$55.00 / ea   |          |   |
| Select v  | Blasting: Select                       | <u>۲</u>   | S55.00 / ea<br>Quote: #000159 - Line 1<br>Last Modified: 3/11/24, 2:37 PM    | :        |   |
| GL Account:   | Powder: Baby Blue<br>From: Part Number | e x ~      | \$10.00 / lb   |          |   |
| 47900 (Income - Sales) × V                            | Predictive Inventory Usage Pe          |            | Quote: #000134 - Line 1<br>Last Modified: 2/8/24, 12:16 PM                   | •        | 1   |
| Cert Pdf Template:                                    | Part                                   |            | \$0.87 / ea<br>Quote: #000128 - Line 3                                       | :        |   |
| Select  |  |            | Last Modified: 2/6/24, 12:04 PM  |          |   |
|   | Baby Blue X Y                          | LBS        | \$4.80 / ea<br>Quote: #000099 - Line 1                                       | :        |   |
| Is Template Part Number:                              | Sunset Orange X                        | 53 LBS     | Last Modified: 1/18/24, 8:57 AM  |          |   |
| as a template for creating other common part numbers. | Forest Green X V                       | 4 LBS      |  |          |   |
|   | + ADD ITEM                             |            |  |          |   |
| Manage Specs  |  | MANAGE S   | PECS FROM THE  |          | >   |
|   |  | "EDIT PAR" | T NUMBER" DIALOG   |          |   |
| UPLOAD DISPLAY IMAGE                                  |  |            |  |          | X CANCEL SAVE                                   |

Click "Manage Specs" on the Edit Part Number page to adjust specs on part numbers.

Specs are also now available in the process composer. In the process composer, if you compose with a spec, the process linked to the spec is automatically included in the adjusted process.



The Process Composer, visible when you edit work order recipes, now includes the ability to manage specs on work orders. Adding a spec now also adds the corresponding process.

As always, please reach out to us at <a href="mailto:support@gosteelhead.com">support@gosteelhead.com</a> with any questions!

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