Subject: Steelhead Weekly Newsletter 10/21/2022

Date: Friday, October 21, 2022 at 7:00:31 AM Central Daylight Time

From: Jeff at Steelhead Technologies
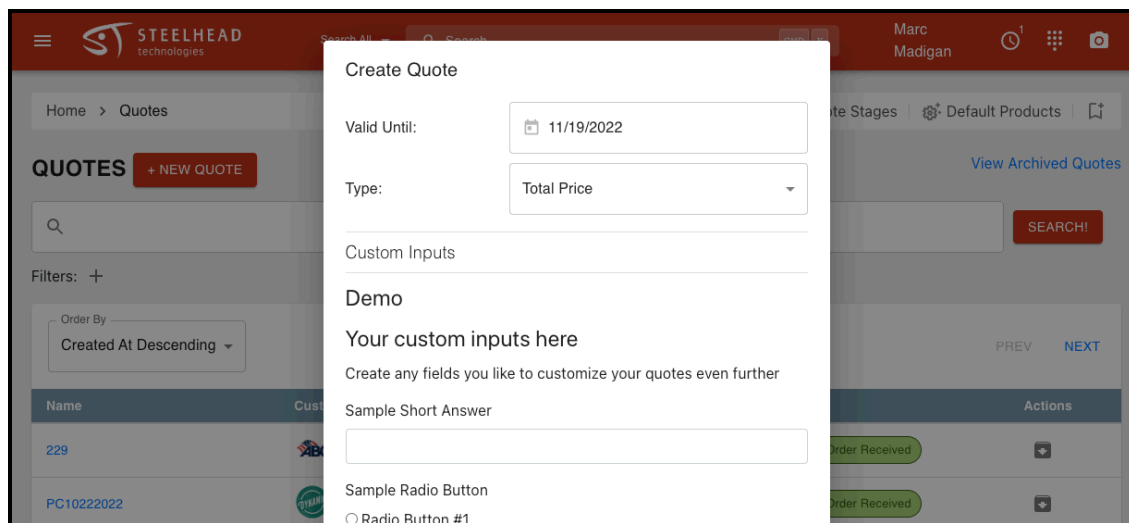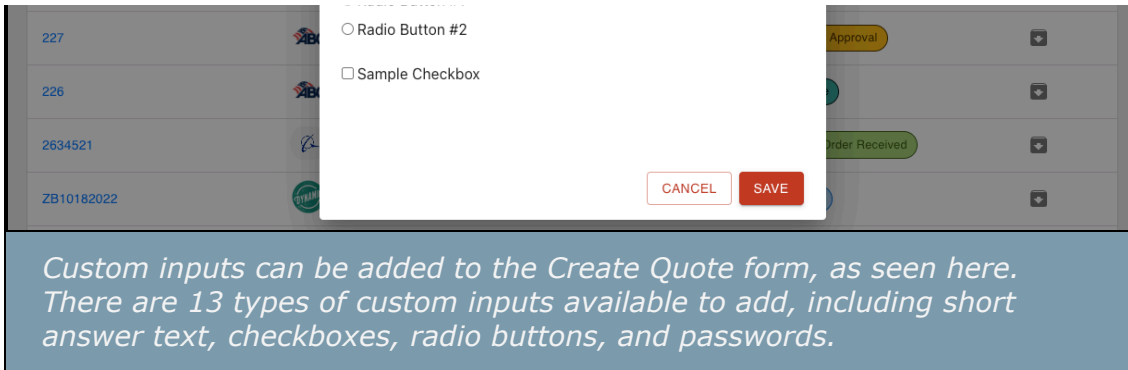
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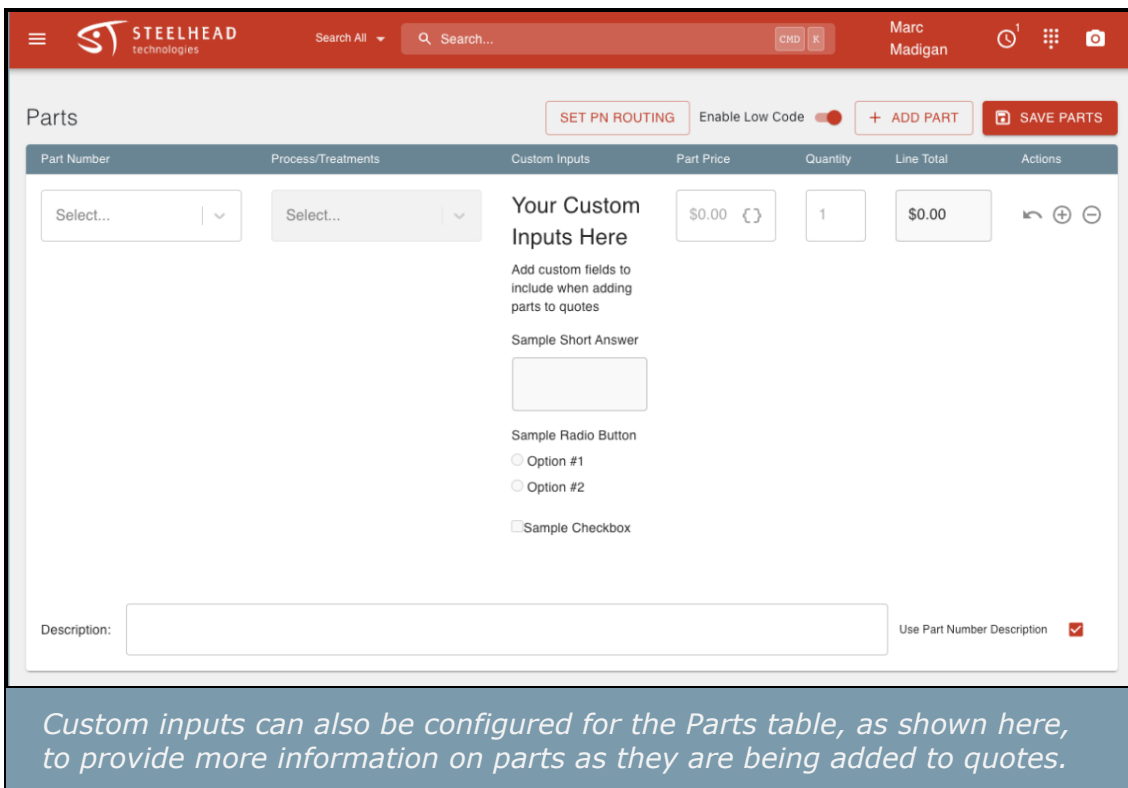

Weekly Newsletter
October 21st, 2022

Rapid, On-Point Quoting Has Never Been Easier

Quoting isn't inherently an easy process. Accurate quoting, conducted using up-to-the-minute data from your plant, can go a long way towards winning jobs and improving your bottom line. By using data already entered into the system, generating a quote in Steelhead requires minimal effort, especially for existing customers. Parts, processes, products, customers and contact information, custom inputs, and all sorts of other information are used to populate your quote fields, allowing you to move through quoting rapidly.

Custom inputs can be added to the Create Quote form, as seen here. There are 13 types of custom inputs available to add, including short answer text, checkboxes, radio buttons, and passwords.

The speed of quoting in Steelhead does not come at the expense of detail or flexibility, however. Custom inputs are available on both the Create Quote form and the Parts table on each quote. For more info, check out our knowledge base article on Custom Inputs on Quotes.

Custom inputs can also be configured for the Parts table, as shown here, to provide more information on parts as they are being added to quotes.

If your quoting process requires multiple steps, configuring Quote Stages is simple. Quote stages are customizable steps that quotes pass through on their way to becoming active quotes. For example, you may want to have quote stages for Drafts, Sales Approval, and Ready to Send statuses.

Quote stages give you additional control over your job costing process. Quote stages appear as status from the Quotes home page and on the page for individual quotes. Click on the Move Stage/Request Revision button to advance the quote to the next stage in the workflow.

Learn more about quoting in Steelhead by looking through our latest knowledge base articles:

- [Converting a Quote to a Received Order](#)
- [Creating a Quote](#)
- [Custom Inputs on Quotes](#)
- [Quote Stages](#)

Spotlight: Chet Daavettila, Product Engineering

Meet Chet, the newest addition to the Steelhead engineering corps.

Chet Daavettila graduated from Michigan Technological University in 2016 with a degree in Mechanical Engineering. Before joining Steelhead in the summer of 2022, he worked as a Controls Engineer at General Motors.

Chet's broad technical skills, background in mechanical engineering, and previous experience as a controls engineer give him a distinct edge when tacking complex software engineering problems. With Steelhead, Chet has invested his time and energy into building out tools for managing inventory, tracking part locations, and part transforms. In a few short months, Chet has already established himself as an invaluable asset to Steelhead Technologies. We're very excited to see what Chet's future at Steelhead holds!

Meet the rest of the Steelhead team [here](#).

Visit the Steelhead Customer Success Portal