Subject: Steelhead Weekly Newsletter 10/07/2022

Date: Friday, October 7, 2022 at 6:59:59 AM Central Daylight Time

From: Jeff at Steelhead Technologies

To:

Weekly Newsletter
October 7th, 2022

Create and Send Invoices in Seconds!

When your parts, services, work orders, shipping, and customer information are all stored in Steelhead, generating an invoice can be lightning fast.

Create an invoice in 1...2...3

Once you have all of your settings dialed in, you can generate an invoice in three clicks from your phone or tablet using the Invoicing Dashboard.

The invoicing dashboard was built with the intention of making invoicing frictionless. Custom document templates that pull in information for you means that your invoice can look exactly the way you want it, every time, with minimal effort. Adding your branding and custom information is easy to do, and once it's set up your invoices will look great every time!

Sorting and prioritizing orders to be invoiced is intuitive with the Status check box filters. Just check "Ready to Invoice" and see what orders are waiting to be invoiced.

Filter your work orders by their invoicing status - Fully Invoiced, Ready to Invoice, Partially Invoiced, Not Invoiced, or Completed.

Once an invoice is completed, all that's required to send it to a customer is two more clicks - one to open the email dialogue, and one to send. If the invoice is for a repeat customer, the editable recipient address and message are saved from the last invoice.

Invoices (last 30 days)　　　　　　　　　　　📄 VIEW ALL INVOICES

#█████████　　████████████████
10/6/22, 9:18 AM　　Total: $8,176.78 | Terms: Net 30
　　　　　　　　　　Multiple Received Orders

Invoice Sent on 10/6/2022, 9:18:57 AM

You can also see records of when invoices were sent to customers. A green check on the email icon indicates that the invoice was emailed; hover over it to see when it was sent. When the bank icon appears, it means that the invoice information has been synced to your accounting software.

Learn more about how to get the most out of the Invoicing Dashboard with our newest user documents.
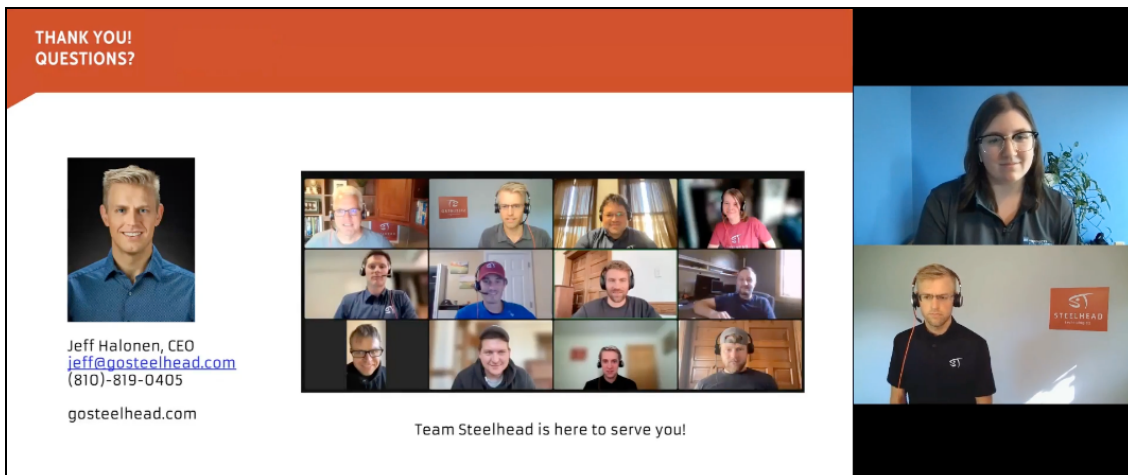
- Invoicing
- Navigating the Invoicing Dashboard
- Creating Invoices
- Voiding and Adjusting Invoices

As always, if you have a question or comment, let us know. Reach out any time at support@gosteelhead.com!

How To Improve Profitability In Your Shop

Steelhead CEO Jeff Halonen recently hosted a webinar with Products Finishing entitled "How to Maximize Profitability of Metal Finishing Shops." Watch the webinar here.

Meet the Steelhead Team

Visit the Steelhead Customer Success Portal