

Creating a Custom SOW

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This article provides instructions on how to create a custom Statement of Work (SOW).

Navigate to the Quote queue

1. From the **Quote** queue, click the quote associated with the customer

2. Edit the Quote

- a. Click the pencil icon to edit **Custom SOW**
- b. Click the box for **Custom SOW**
- c. Click **Save**

3. Click the dropdown menu

- a. Verify that **General OAF** and **Generate OAF & SOW** combo are visible
- b. Click **Generate OAF**

Upload Custom SOW

1. Click the **Related** tab

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2. Click **Upload Files** and upload your custom SOW. Click **Done** when upload is completed.

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Submit for Approval

1. Click the dropdown menu
2. Select Submit for Approval

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