SOW Templates

beeline self-service	SOW Templates through Self-Service allows users to set-up and manage templates that delimit the fields and default content for SOWs.

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to SOW Templates via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Statement of Work.**
4. Click **SOW Templates** from the list of available Statement of Work Self-Service features, to be taken to the SOW Template List page.
5. The SOW Template List page shows all active or inactive templates across all project agreement types. Users can add a new template, copy an existing or filter by if a template is an active project type, geography name or industry name.

How to Create a New SOW Template:

Complete steps 1-4 above.

5. Click **Add New**.
6. Fill out the general information section, including all required fields marked with an asterisk. The Active checkbox should be checked if you want the template to be visible to users. The Code field should not have any spaces.
7. Continue filling out all necessary sections. Please note that set-up may be unique to client.
8. To create a single template, click the OK option. If multiple templates are needed, click the Save and add New option; then repeat populating the template fields. Use the **OK** option for the final record to save and exit.
9. Select **Save and Edit Default** Content to be taken to the SOW view with fields that can be populated with content that you would like to the template to default to. (I.e., you populate a business justification I that field and whenever that template is selected, the description you entered will already populate).

How to Edit a Selected Template:

Complete steps 1-4 above.

5. Click into an existing SOW Template to be taken to the **View Template** screen.
6. Click **Edit**.
7. Edit fields on the existing template and activate or deactivate the template.
    - **Edit** = allows you to edit fields on the exiting template and activate or deactivate the template.

How to Manage Default Content for a Template:

Complete steps 1-5 from the "How to Edit a Selected Template" section.

8. Click the **View Default Content** button to preview the SOW Template as it appears for the end-user.
9. Populate fields within the General Information, vendors, Contributors, Terms and default Financial sections, with default content that you wish to be displayed without the user having to select it for themselves when they create a SOW. *(I.e., If the Owner of this type of SOW is always going to be the same, you can populate that field with the owner's name when managing the default content. It will default to that person when an end-user is creating a SOW from that template now. Any fields left blank will not have default content populate when creating that type of SOW.)*
10. Click **Save** after each page.

Main Benefits:

- Provides visibility to all templates across all project agreement types including active and inactive templates.
- Includes the ability to create new or manage default content of existing template content.