This guide will walk you through the new SOW Enhancements to Wand. It covers some of the primary features to help you get up and running fast!
SOW “Quote Withdraw” Enhancements

Adds the ability to undo the withdraw of a quote from a Project

New functionality added to undo the withdraw of a quote

This feature is targeted towards both Supplier users, as well as Onsite users.

As part of the SOW workflow in Wand, Suppliers and Onsite users have traditionally been able to submit quotes to a project, as well as withdraw quotes as necessary. However, this new enhancement to the SOW workflow now allows those users the ability to undo the withdraw of the quote. This means that if the user accidentally withdraws a quote, or decides to reverse their decision, Wand now offers them the ability to easily so do with the click of a button.

- Login to Wand and search for the Project Request that you would like to view
- After you have navigated to the Project, select the Sourcing tab
- View all of the quotes that have been submitted, as well as their status
- Withdrawn quotes will now have an “Undo Withdraw” button

Selecting the “Undo Withdraw” button will allow you to reverse the decision of a quote withdraw and save you a significant amount of time from having to resubmit from scratch!
Configuring the Edibility of SOW Quotes

In Wand, Suppliers have the ability to edit quotes after they have been submitted. This may sometimes cause an issue however, if the quote is currently in approval routing, and the approver is reviewing and approving an amount that is no longer valid. The new functionality now allows this option to be configured, and Suppliers can be blocked from editing quotes in approval routing.

Note - this functionality is set by Op Unit, and is defaulted to not allow Suppliers to edit quotes in approval routing.

How to Enable or Disable this Functionality

- Log in to Wand as an MSP user
- Proceed through Wand to select an Op Unit
- Select the “General Config” then “Configuration” tab
- Check the box next to the “Allow Supplier to edit...” option to toggle this option “on” or “off”
Other SOW Enhancements
Additional enhancements to the SOW workflow in Wand

New Automated Emails for Quote Updates

This feature triggers automatic emails to the Onsite when the Supplier has updated a quote.

Wand now notifies the Onsite user when a Supplier updates a quote that has been submitted for a Project in Wand. This notification is sent in the form of an email that is automatically triggered when a Supplier modifies the quote in the following ways (note - different email templates will be sent based on the type of email triggered):

- Supplier edits the quote by increasing the value of the quote
- Supplier edits the quote in any other way, even if the value of the quote is not increased

Other Automatic Email Notifications

Additional notifications have also been added to the SOW workflow when a Supplier adds or updates worker information. This notification is sent in the form of an email that is automatically triggered when a Supplier modifies the quote in the following ways (note - different email templates will be sent based on the type of email triggered):

- Supplier updates the worker information attached to a quote
- Supplier adds other worker information to a worker attached to a quote

Configure the Ability for a Supplier to Add/Remove Workers

In conjunction with this feature, an enhancement has also been added to allow the Onsite to turn the ability for the Supplier to add, remove, or modify workers on or off.

This can be done at the Op Unit level, under General Config, then Configuration.
Resolution of Existing Issues

Extension Approval Bug

When an extension approval is requested, and the extension is then rejected by the approval, the total quote total will now be reflected correctly.

Note: this will affect newly created approvals only, not pending or completed approvals.

Billing Approval Bug

When a billing item is created for a project, and the billing item is then rejected by the approver, the balance changes will be reversed and will now be reflected correctly in the quote.

Note: this will affect newly created approvals only, not pending or completed approvals.