

Select Transmittal Templates on Project

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Navigate to the "Main" tab of the **Project Configuration** page (Project Menu > Set Up > Project Configuration) page of your project.

Expand the "Transmittal" section and select any Transmittal Templates that are available for use from the drop-downs. You can select different transmittals to be used for your Customer (shown as Acme in screenshot below) and Sub-Supplier.



Note: Internal/3rd Party Transmittals will use the selection you made on your Sub-Supplier Transmittal.

The screenshot displays the 'Project Configuration' page for 'Valve Project (0001234)'. The 'Main' tab is selected under the 'Set Up' section. The 'Project Configuration' page is divided into two main panels: 'Project Profile' on the left and 'Templates' on the right. The 'Project Profile' panel includes sections for 'Project Profile', 'Doc Code and Status Lists', 'Users and Key Contacts', 'Card Settings', and 'Revision Numbering'. The 'Templates' panel includes 'Cover Pages and Stamps', 'Transmittal', and 'Prices and Estimates'. The 'Transmittal' section is expanded, showing a red box around the 'ACME transmittal' section. This section contains two rows: 'PDF' with a dropdown menu showing 'Default Transmittal Template with Omega Num (sys...)' and 'CSV/XLS' with a dropdown menu showing 'Default CSV Transmittal Template [CSV] (system)'. Below these is the 'Sub-Supplier transmittal' section, which also has a 'PDF' dropdown showing 'Default Sub-Supplier Transmittal Template (system)'. The 'Internal/Third-Party transmittal' section is noted as 'Always uses the sub-supplier template'. A red arrow points to the 'Transmittal' section header.

Once the desired updates have been made, remember to click **Save Project** to apply the change(s).

For more information on working with Templates please check out our video: [Templates](#)