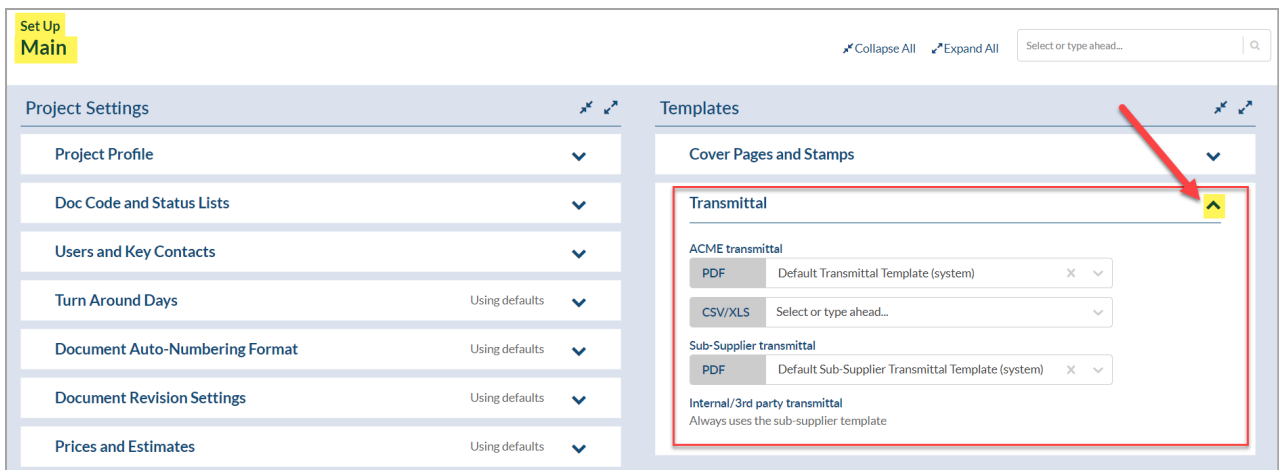


Select Transmittal Templates on Project

10/23/2024 7:00 pm MDT

Navigate to the Main page of your project. In the **Output Settings** section under Submittals, you will have a drop down that will allow you to select any Transmittal Templates that are available for your use. Find the one you want and select it - both PDF and Excel versions. 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. Remember to click **Save Project** when finished!



The screenshot shows a web application interface with a top navigation bar containing 'Set Up Main', 'Collapse All', 'Expand All', and a search box. The main content area is split into two panels. The left panel, titled 'Project Settings', lists various settings like 'Project Profile', 'Doc Code and Status Lists', 'Users and Key Contacts', 'Turn Around Days', 'Document Auto-Numbering Format', 'Document Revision Settings', and 'Prices and Estimates'. The right panel, titled 'Templates', is expanded to show 'Cover Pages and Stamps' and 'Transmittal'. The 'Transmittal' section is highlighted with a red box and contains three sub-sections: 'ACME transmittal' with 'PDF' and 'CSV/XLS' options, 'Sub-Supplier transmittal' with a 'PDF' option, and 'Internal/3rd party transmittal' with a note that it always uses the sub-supplier template. A red arrow points to a yellow expand/collapse icon in the top right corner of the 'Transmittal' section.

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