

Select Transmittal Templates on Project

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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!

Output Settings

Stamp


Acme Stamp XLS: Default Stamp Template [XLS] (sy ▼)


Cover Pages

Acme Cover Page PDF: Customer Cover Page [XLS] (Kirs) ▼ CSV/XLS: Customer Cover Page [XLS] (Kirs) ▼
Create Excel coversheet for Excel files only Embed Excel file as worksheet on Excel files
Sub-Supplier Cover Page PDF: Default Sub-Supplier Cover Page ▼

Submittals

Batching Normal Separate submittal per file

Acme Transmittal  PDF: Transmittal template - test KR [XI] ▼ CSV/XLS: Transmittal template - test KR [XI] ▼

Sub-Supplier Transmittal  PDF: Default Sub-Supplier Transmittal ▼

Internal / 3rd Party Transmittal *Uses the Sub-Supplier transmittal templates*

Delivery Medium Email ▼ Show Delivery Medium in Submittal Popup

Require Name for Doc Access Yes ▼

Add Comments Page to Document on Submittal

Position of comment/markup pages (on submittal) End ▼

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