

# Select Cover Page Templates and Settings on Project

09/16/2024 1:38 pm MDT

Navigate to the Main page of your project. In the **Output Settings** section under Cover Pages, you can choose which template you want to use for your project, for both Customer and Sub-Supplier submittals. You can also choose here how you want to create Excel cover pages - add to Excel files only or All Files, and if you want to embed the excel cover page into the Excel document you are sending out.

**Output Settings**

**Stamp**

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

**Cover Pages**

Acme Cover Page 1 PDF: Customer Cover Page [XLS] (Kirs) CSV/XLS: Customer Cover Page [XLS] (Kirs)

Create Excel coversheet for 2 Excel files only  Embed Excel file as worksheet on Excel files

Sub-Supplier Cover Page 3 PDF: Default Sub-Supplier Cover Page

1) Select from drop down list of available Cover Page templates that are available for your use on the project - select both PDF and Excel version.

2) Select from drop down if you want to create **Excel** cover pages for Excel files only, or All files. Once this selection is made, then select the checkbox if you want to Embed the Excel file as a worksheet in your Excel files. If this checkbox is not enabled, Excel cover pages will be added to your submittal as a separate file.

3) Select from drop down which Sub-Supplier cover page you want to use on the project.

Remember to click **Save Project** on the top left of the screen once your selections have been made!

Valves Demo (092214) Main

Set Up Main

Save Project Copy Project Hide Project Complete Project

**Profile**

Project Type: Order Quote

Customer: Acme Chemical

Customer Address: Edmonton Office

Project Name: Valves Demo

Project Description: [Empty]

Job: [Select Job]

Wolfe Sales Order: 092214

Package Number: [Empty]

PO Number: 4321

PO Rev Number: 0

End User: [Select End User]

End User Address: [Select Address]

End User Reference: [Empty]

Order Date: 2021-09-27

Initial Guess for Drawing Approvals: 2021-10-25

**Default Users/Lists**

Wolfe Doc Control User

Wolfe Project Engineer User

Wolfe Drafting User

Wolfe Project Manager User

Acme/End User Engineer

Acme/End User Expediter

**Output Settings**

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**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: Default Transmittal Template (sy)

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:  End

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

**Submittal Numbering Format**

Type of Format: Pattern per Target

Acme Submittal Pattern: T--Sequence###

Sub-Supplier Submittal Pattern: T[S]--Sequence###

Internal / 3rd Party Submittal Pattern: T[I]--Sequence###

Ad-Hoc Submittal Pattern: T[A]--Sequence###

**Submittal Notification Emails**

Acme [Empty]

Ad-Hoc [Empty]

If you wish to modify the cover page preferences based on each Doc Code, [click here to read the article Cover page](#)

and Stamp preference for each doc code.

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

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