

Testing Transmittal Templates

09/16/2024 1:57 pm MDT

Users can test transmittal templates without needing to complete a submittal.

Before testing, the template will need to be [uploaded into DocBoss](#) and then added to a project under the appropriate template type (customer or sub-supplier).

Steps

Navigate to **Outgoing Submittals**.

To test a customer transmittal template, select a document in the customer queue and select **Start Submittal**. (To test a sub-supplier transmittal template, use a document in the sub-supplier queue.)

Cards In/Out
Outgoing Submittals

Select	Doc No. (Alpha)	Card Name(Auto)T	Level	Reference	Doc Code	Doc No. (ACME)	Rev # (KT)	Stage	Status	Due to ACME	Comment
<input checked="" type="checkbox"/>	4529-V25-001-01	V25_Supplier1	Sub-Supplier	Supplier1	V25 Operating / Maintenance Manual		0	IFI	X	2023-01-03	

From the **Start Submittal** popup, scroll down and select (1) **Preview Summary (PDF)** and/or (2) **Preview Summary (XLS/CSV)**, depending on the required format for transmittals. Open the downloaded file and review that it looks correct.

Submittal Settings

Batching: Normal Separate submittal per file

Submittal Number: T-002 Submittal Date: 2023-02-01 15:54:46 Sequence: 2

Submittal Comments:

Turn around: 10 (working days)

Distribution List:

Include markups:

Send submittal email notification

Add Supporting (Uncontrolled) Documents to this Submittal

Add all cards to Ad-Hoc queue after submittal

1 2 3

If anything needs to be updated, [make the necessary changes in the template file](#), upload the new version, and test

again. To save time, it is possible to upload the template file to **Output Templates** in a new browser tab, then return to the open **Submittal Settings** popup to generate the preview again (no need to refresh the page).

When done testing the file, select (3)**Cancel** on the **Submittal Settings** popup so that no submittal is created.
