Testing Transmittal Templates

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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.)

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.

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.