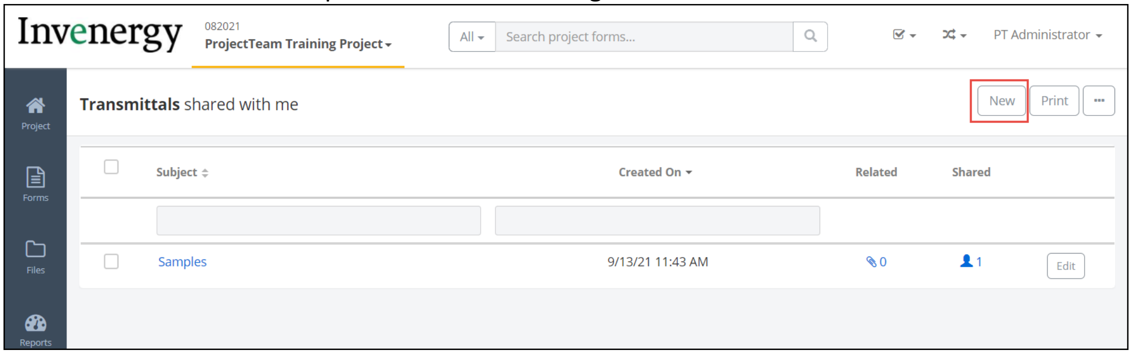
Transmittals

Creating a New Transmittal

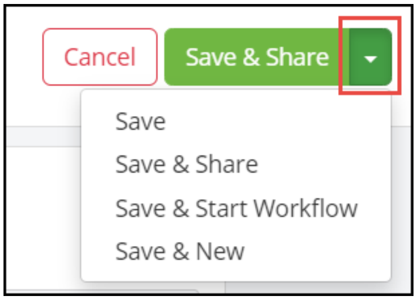
1. Navigate to the Transmittal log within a project.

2. Click the **New** button on top of the Transmittal log.



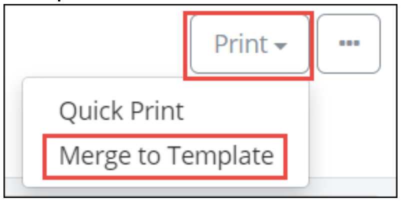
3. Fill out Transmittal Form with below guidance.
    a. Type:
        i. Contractor - When the transmittal is in reference to complementary information for a submittal i.e., sample
        ii. Letter- When the transmittal is in reference formal distribution of any other document or communication relevant to the project
    b. Select recipient company and individual names
    c. Add Reference detail: detail of information requested in a contractual document
    d. Select appropriate boxes
    e. Add in individual items and transmittal method (ability to add attachments at this step)

4. Click Save to save your progress and return later to finish the transmittal if needed. Alternately, you can Save & Share, Save & Start Workflow, and Save & New to perform multiple actions at once.

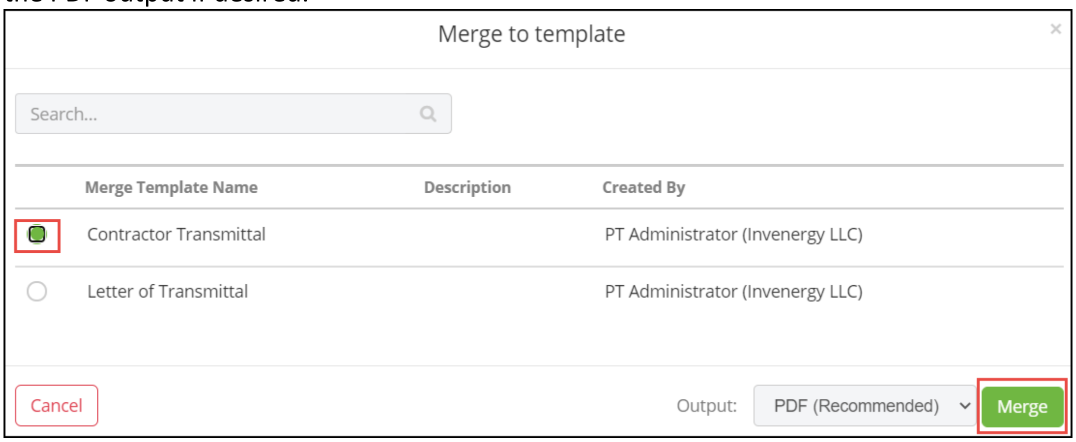


Print a Transmittal

1. From the record, in read mode, click on Print in the upper right and then click Merge to Template.



2. Select the appropriate template and click Merge. Note: If the record has attachments the Merge button with display Next, clicking Next will then allow you to include attachments in the PDF output if desired.



3. From the Merge Template preview window Save & Download to save the merge document and download it to your local drive, Save & Email to save the merge document and email a copy, or Save & Share to save the merge document and share it with other users.