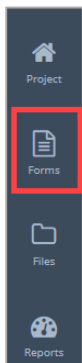


Transmittal

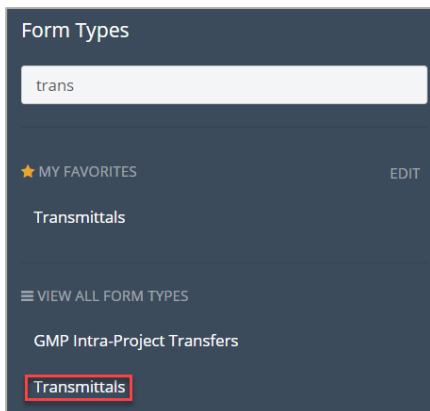
The **Transmittal** form allows the members to enter information for tracking correspondence, orders, and packages associated with a project.

Creating the Transmittal

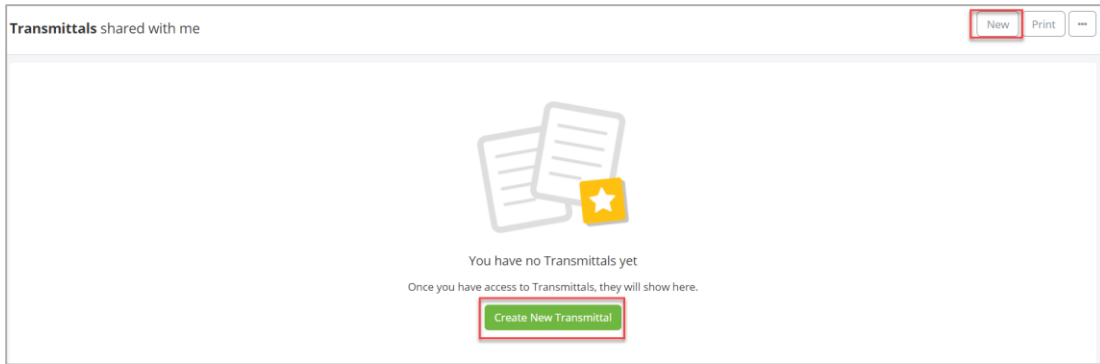
1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search area of the **Form Types** start to enter **Tra** and select **Transmittals**.



3. Click the **Create New Transmittal** button located in the middle of the log or click the **New** button in the upper right corner.



- 4. Enter a **Subject**.

Subject * Required

Type the Subject

- 5. Click inside the **Date** field and select the date. Note the current date will automatically populate but this date may be changed.

Date

03/02/2020

< March 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

- 6. Click inside the **Transmitted By** field and select a name from the list.

Transmitted By

- 7. Click inside the **From Company** field and select the company name from the list.

From Company

- 8. Click inside the **Attention** field and select the name from the list.

Attention

9. Click inside the **To Company** field and select the company name from the list.

To Company

10. Click inside the **Delivered Via** field and select the delivery method from the list.

Delivered Via

11. Enter a **Tracking Number**.

Tracking Number

12. Click inside the **Package Transmitted For** field and select from the list.

Package Transmitted For

Detailed Items

13. Click the **Create New** button.

Detailed Items

Quantity	Item	Reference	Notes	Description	Transmitted For
----------	------	-----------	-------	-------------	-----------------

- a. Enter **Quantity**.

Quantity

- b. Click inside the **Items** and select an item from the list.

Item

- c. Enter a **Reference**.

Reference
Type the Reference

- d. Enter any additional **Notes**.

Notes
Type the Notes

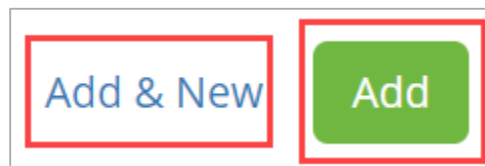
- e. Enter a **Description**.

Description
Type the Description

- f. Click inside the **Transmitted For** field and select from the list.

Transmitted For

- g. Click the **Add & New** to save the Detailed Item and add a new record or click the **Add** button to add the record and return to the Details page.



Courtesy Copies

- 14. To add Courtesy Copies, click the **Create New** button.

Courtesy Copies

Contact	Company	Location	Telephone	Notes	Copies

Create New

- a. Enter a **Contact** name.

Contact

- b. Enter a **Company** name.

Company

- c. Enter a **Location**.

Location

- d. Enter a **Telephone** number.

Telephone

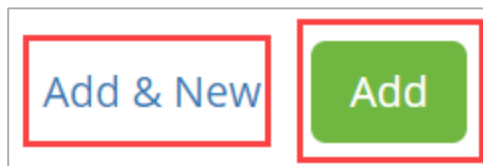
- e. Enter any applicable **Notes**.

Notes

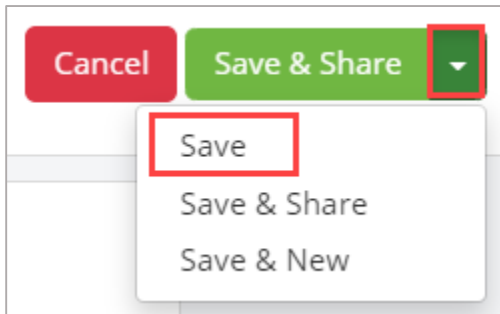
- f. Enter **Copies**.

Copies

- g. Click the **Add & New** to save the Courtesy Copy and add a new record or click the **Add** button to add the record and return to the Details page.

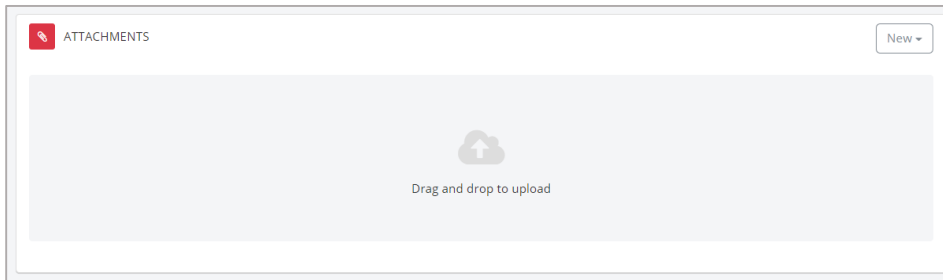


15. To complete and save the **Transmittal** document, click the dropdown arrow beside **Save & Share** and click the **Save** button.



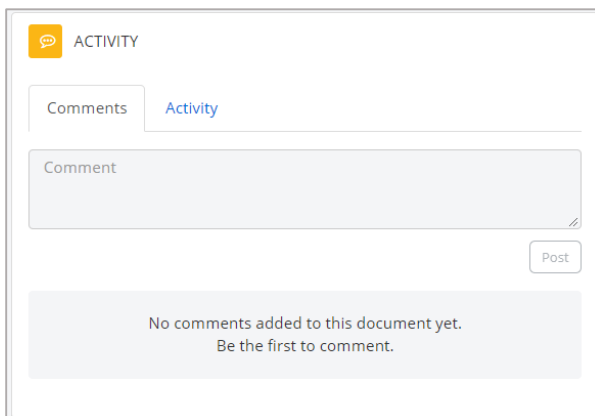
Attach Supporting Documentation

1. Drag and drop any supporting files to the **Attachments** section of the record.



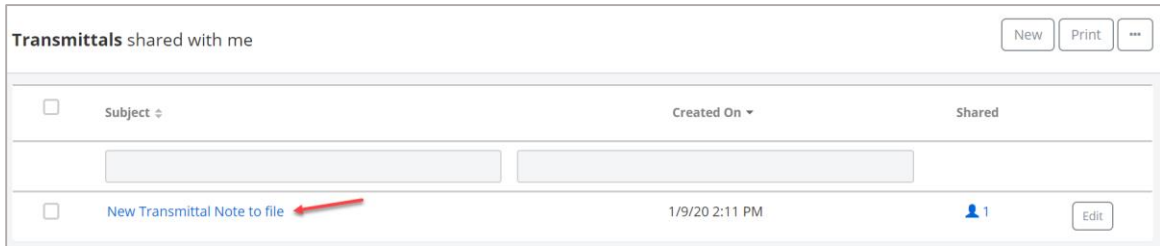
Comments

1. To ask questions or add commentary regarding the Task record, use the **Comments** section.

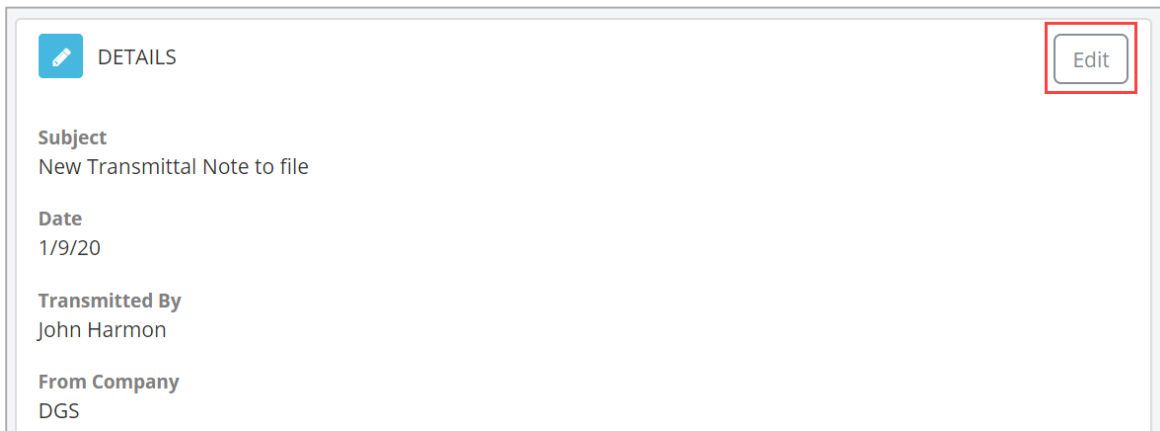


Editing a Transmittal Document

1. To edit a transmittal document, open the Transmittal register log and click **the title of the Transmittal** document you would like to edit.



2. Click the **Edit** button in the Details section of the transmittal record.



3. To complete and save the **Task** document, click the dropdown arrow beside **Save & Share** and click the **Save** button.

