

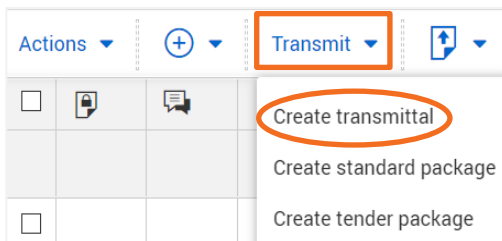
QUICK GUIDE

TRANSMITTAL ESSENTIALS



CREATE A TRANSMITTAL

1. From the **Document Register** ► select the documents to transmit.
2. Click **Transmit** ► then **Create transmittal**.



3. Enter transmittal details.
4. Add additional or remove documents using the **+** and **×** icons.
5. Select **Notify on Revision** to automatically notify recipients about future transmittals of revised documents.
6. Once complete ► click **Send**.

NEED SOME MORE HELP?



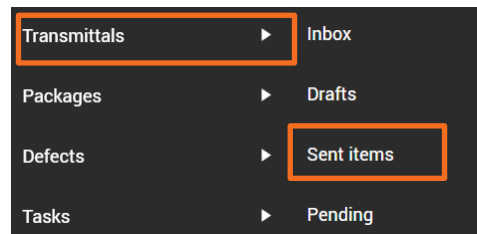
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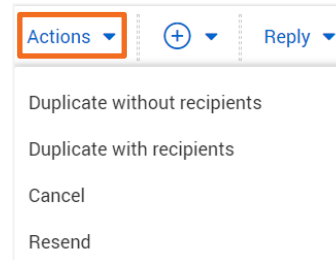
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DUPLICATE/RESEND A TRANSMITTAL

1. Click the module menu ► select **Transmittals** ► then **Sent Items** register.



2. Click **Actions** and select **Duplicate** or **Resend**.



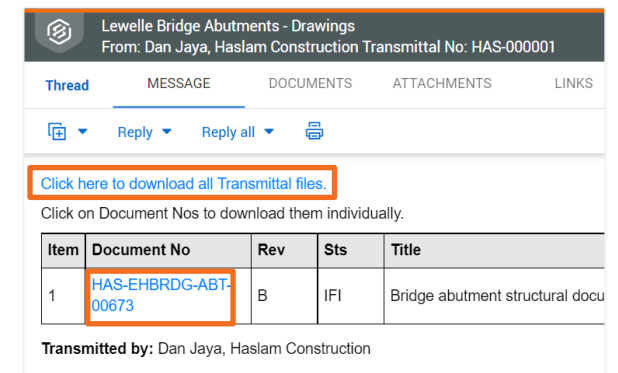
3. Edit the transmittal details and click **Send**.

CANCEL A TRANSMITTAL

1. Click the module menu ► select **Transmittals** ► then click **Sent Items**.
2. Click **Actions** and select **Cancel**.
3. Click **Yes** and enter a reason for cancelling.
4. Select whether you want to notify the recipient(s).
5. Click **Confirm cancellation**.

RECEIVING A TRANSMITTAL

1. Transmittals are sent to the recipient's email Inbox but can also be accessed via the Transmittals Inbox within InEight Document.
2. To download documents from a Transmittal, click on the blue file download-links.



3. Select the file type you want to download ► then click Download.

