TRANSMITTAL BASICS (CLASSIC)

InEight® DOCUMENT
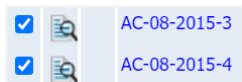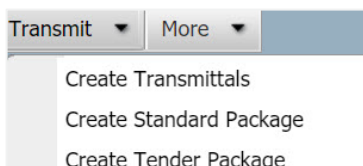
⬡ CREATING TRANSMITTALS

1. From the document register, use the check boxes to select the documents you wish to upload.

   ☑ 🔍 AC-08-2015-3
   ☑ 🔍 AC-08-2015-4

2. Select the **Transmit** option above the register, then **Create Transmittals**.

Transmit ▾	More ▾
Create Transmittals	
Create Standard Package	
Create Tender Package	

3. Enter the recipients as you would for mail.
4. Enter subject and message details.
5. Complete all other required fields such as:
   a. Reason for Issue
   b. Respond by Message
   c. Respond by Date.
6. Scroll down the bottom of the transmittal to review included documents and remove unnecessary formats if required by unticking.
7. Click **Add Documents** if additional documents are required.
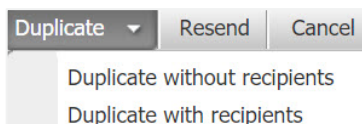8. Click **Send**.

Note: Transmittals can also be created by selecting **New** >**Transmittals**, and then selecting from the available transmittal types.

⬡ ADDING RECIPIENTS (ADDRESS BOOK)

1. From the creation screen select **To:**
2. Filter by company.
3. Select Contact(s).
4. Use the arrows to allocate to the To or CC fields.
5. Click **OK** once complete.

⬡ RESEND OR DUPLICATE TRANSMITTAL

1. Select **Transmittals** module, then **Sent Items**.
2. Locate the transmittal and double-click to open.
3. Select from the following:
   a. **Duplicate** without recipients
   b. **Duplicate** with recipients
   c. **Resend** (to resend with no changes)

Duplicate ▾	Resend	Cancel
Duplicate without recipients		
Duplicate with recipients		

4. If duplicated, update transmittal as required.
5. Click **Send**.

Note: Received transmittals (located in the Inbox) can also be duplicated.

⬡ CANCELLING A TRANSMITTAL

1. Click **Sent Items**.
2. Open Transmittal to be cancelled.
3. Select **Cancel**.

Duplicate ▾	Resend	Cancel

4. Select the Transmittal and provide a reason for cancelling.
5. Click **OK**.

⬡ CANCELLING A TRANSMITTAL

1. Open the transmittal from your email inbox.
2. Select the **Click here to download all Transmittal files** link. This opens the document download window.
3. Select documents to download then click **Download**, or click the viewer icon to view online.

Download	Download All	Download Comments	Close
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