

Apply eSignatures to Outgoing Submittal

10/01/2025 4:09 pm MDT

This article explains the third step in the eSign process.

Select cards, and initiate submittal

Select the documents you wish to send and start the submittal. You will see the normal pop up with a few different options.

The screenshot shows the 'Start Submittal' dialog box with the following content:

Card Name(Auto)T	Sign document	eSign	eSignatories	Level	Doc No. (Customer)	Add Header/Footer
D16 42LSHH-00503	<input checked="" type="checkbox"/>	Instance (Background)		Tag (TE)	234234-D16-011-01	<input checked="" type="checkbox"/>
E02_FTL51-QAE2BB4E5C+KGZ1[FTL51-72XK1/0]	<input checked="" type="checkbox"/>	User (Visible)	.ed	Item/Model (TE)	234234-E02-001-01	<input checked="" type="checkbox"/>
E02_FTM51-HAF2L4A57AY [2200.00]	<input checked="" type="checkbox"/>	User (Visible)	.ed	Item/Model (TE)	234234-E02-002-01	<input checked="" type="checkbox"/>

Submittal Settings

Batching: Normal Separate submittal per file

Submittal Number: TRANS-234234-002

Submittal Date: 1/20/2021 11:55:02

Sequence: 2

Submittal Comments: [Text area]

Turn around: 15 (working days)

Distribution List: Select distribution list

Include markups:

Warning: Some documents require eSignatures. The "Send email" function will be available after all signatures have been added.

Add Supporting (Uncontrolled) Documents to this Submittal

DROP FILE(S) HERE

Add all cards to Ad-Hoc queue after submittal

Buttons: Preview Summary (PDF), Preview Summary (XLS/CSV), Cancel, Start

1. New columns showing eSignature defaults. Can remove signature requirements if desired.

2. Warning that some files require eSignatures, so the submittal will not be issued to target until signatures are finished.

3. The "submit" button is replaced with a "Start" button.

After Start

The submittal will process (add cover pages etc.) but will be placed on HOLD.

The submittal shows as "Waiting for eSignatures" and the entry has a background color.

Submittals				
Number	Created	Post-Submittal Action	Submittal Date	Contained Doc
TRANS-234234-002	1/20/2021 11:57:35	Waiting for signing	1/20/2021 11:55:02	3
TRANS-234234-001	6/7/2019 03:13:30		6/7/2019 03:13:18	4

No more pages | Show on Page: 20 | Items on page: 2

After Signatures have been applied

Once all required signatures have been applied by users, an alert will appear:



Navigate to the "Outgoing Submittals" screen and scroll down to the submittal grid. Here you will see the submittal highlighted in green with a "Post-Submittal Action" stating "Signed, ready to send". Click on the submittal number and you will have the option to send the email out.

Submittals

Grid Rows Colors

Submittals		
Number	Created	Post-Submittal Action
TRANS-234234-002	2021-04-20 15:48:34	Signed, ready to send

For information on how to Generate eSignature Certificates (Step 1), see our article [here](#).

For information on how to Set eSignature requirements per Doc Code (or Card) (Step 2), see our article [here](#).

For information on Signing files with eSignature (User action) (Step 4), see our article [here](#).