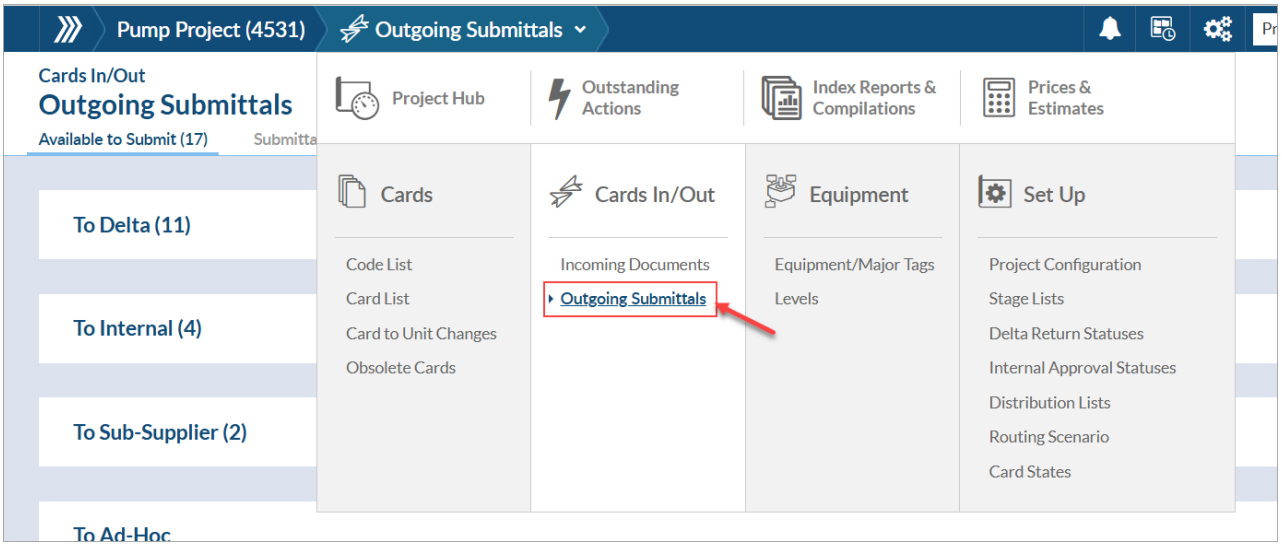
Sending Documents (Outgoing Submittals)

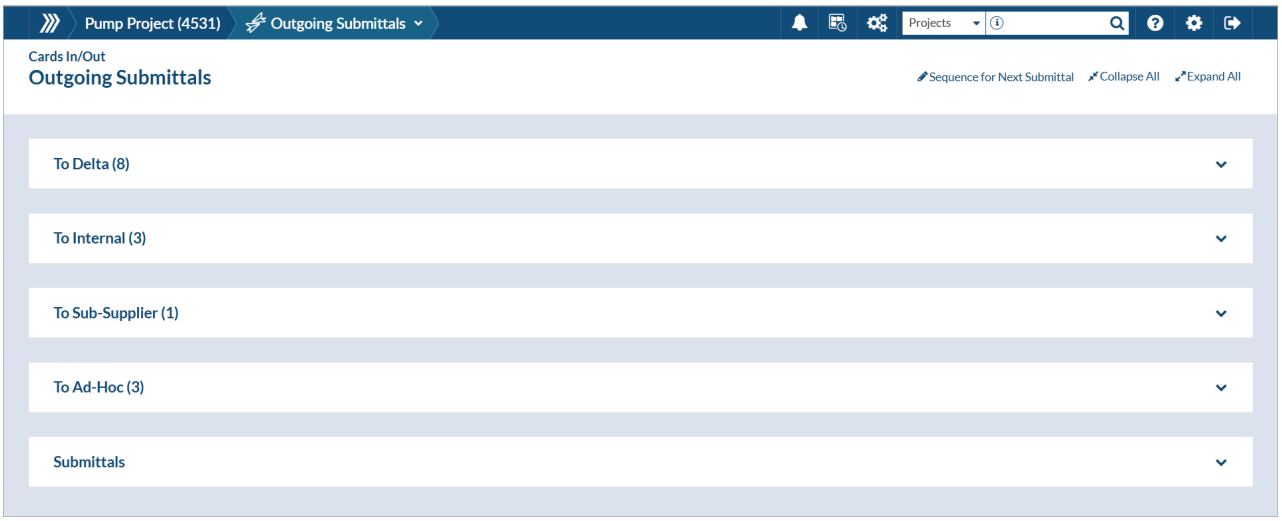
09/28/2026 8:59 am MDT

Documents that are available for submission (based on workflow) will automatically move to a queue located on the outgoing submittals screen.

To see your outgoing submittals, navigate to **Project Menu > Cards In/Out > Outgoing Submittals.**



On the page, there are four target-specific drop-downs which contain the documents that are available for submission (you still have to issue the submittal). The "Submittals" drop-down lists the submittals that have been issued.



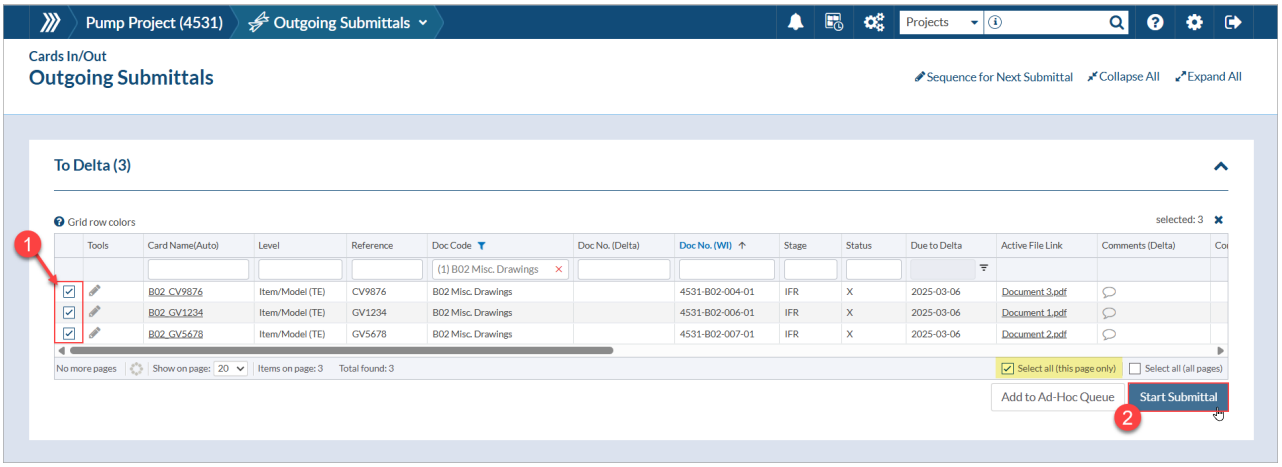
There are four types of submittals you can generate in DocBoss:

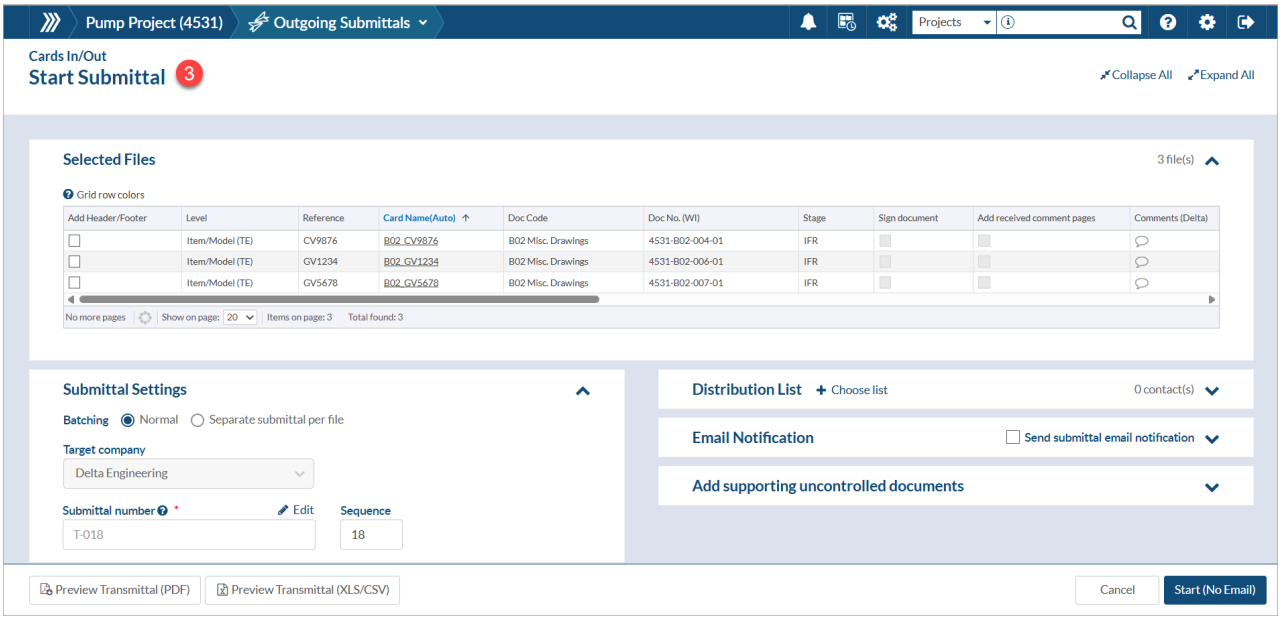
- Customer submittals
- Internal (and/or 3rd party) submittals
- Sub-Supplier submittals
- Ad-Hoc submittals

When a document is ready for submission, it will move to appropriate submittal queue. Once a document has been included in a submittal, it is removed from the grid.

Step 1 - Select the document(s) you wish to submit by checking the box on the left. You can also filter the grid and use the "Select all" boxes if preferred.

Step 2 - Click "Start Submittal", and the submittal form will open.





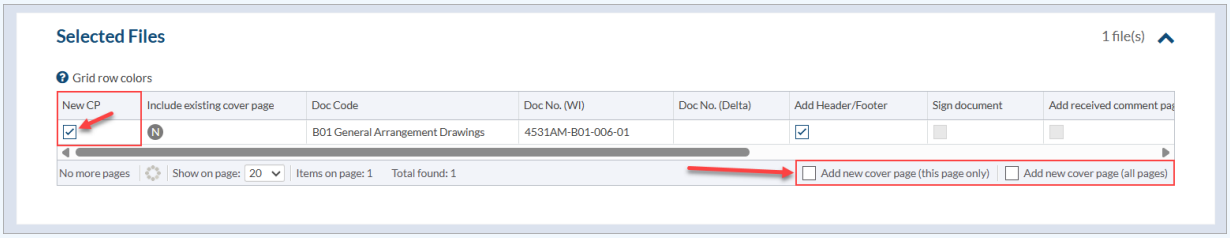
Submittal Settings

- **Batching** – Set to submit all documents together (normal) by default (see article: Send a Separate Submittal per File (Batching))
- **Submittal number** – Set using the project-defined submittal pattern (Project Configuration > Main > Submittal Defaults > Numbering)
- **Sequence** – If you are using the submittal number as a sequential value, this is the value it pulls.
- **Submittal date** – Set as the current date.
    - *Note: To standardized reporting across projects, the time zone set on Admin > General will be the time zone used when generating submittals (submittal date is based on instance time zone), even if custom affiliate admin settings are being used. However, the submittal **creation** date will always be reflected in the user's selected time zone (set on their user profile).*
- **Turn around** (working days) – Number of days used to calculate the date that these documents are expected

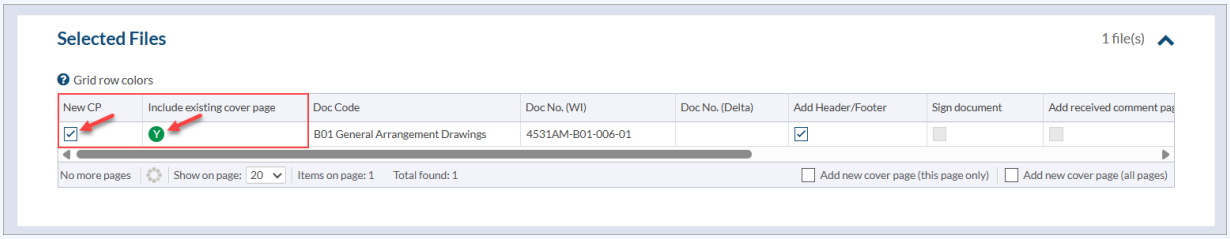
to be returned (based on customer turn around days set on the project - Project Configuration > Main > Card Settings > Turn Around Days)

- **Include markups** – Determines whether or not markups applied in the DocBoss viewer are saved on the file as Adobe comment.
    - *Note: Any markup added by the customer will still be included whether or not the "Include markups" option is enabled.*
- **Submittal comments** – Notes that will appear as comments on the transmittal file.
    - *Note: Where the submittal comments are located is dependent on your transmittal template.*
- **Add all cards to Ad-Hoc queue after submittal** – Determines whether or not cards are automatically added to the ad-hoc queue (often used to submit documents internally for information).

When starting a sub-supplier (or internal) submittal, there is the option to add a new cover page to some or all files being submitted. If checked, a new cover page will be added to the document (using the sub-supplier cover page template selected on project main).



If the "Include existing cover page" option is set to "Y" AND a new cover page is added at submittal, the document will include both a new sub-supplier cover page **and** the cover page returned from the customer.



Distribution List

Click on the "Choose list" to select the recipients of the email notification. To learn more about distribution lists, see this article: Distribution Lists.

Email Notification

- **Send submittal email notification** – Whether or not you would like to send a submittal email notification from DocBoss.
- **Email template** – Option to change the email template. The email body will be auto-filled per the template specifications, but can be edited if required. To learn more about creating/editing email templates, see this article: Create a New Email Template.
- **Include transmittal in email** – The format that the transmittal file is provided in (PDF, Excel, or both).
- **Email subject** – Set based on the selected email template. Can be edited if required.
- **Include files in email** - Option to attach files to the submittal email directly (either as individual attachments or as a single ZIP file).
- **Include hyperlink in email** – Option to include a secure link for the recipients to download the submittal. If de-selected, there will be no link in the email and the option to "Include files in email" should be selected

instead.

- *Note: By default, the link remains active for seven days . Once the link becomes inactive, an actions button appears so you can reactivate the link and extend access. The default link expiration can be changed from **System Menu > Admin > General > Submittals Options**.*

Add supporting uncontrolled documents

Option to add additional files to the submittal (that are not being managed on the project and are NOT expected back).

- **Add files to email** – Files will be included in the submittal but will NOT be listed on the transmittal file.
- **Add files to submittal** – Files will be included in the submittal and WILL be listed on the transmittal file.
  - *Note: There must be a "supporting documents" section included on the transmittal template in order for them to be included on the transmittal file.*



When you make a submittal to the target (customer/sub-supplier), it will become available in the portal. Even if you choose to start the submittal with no email, the submittal will still appear in the portal.