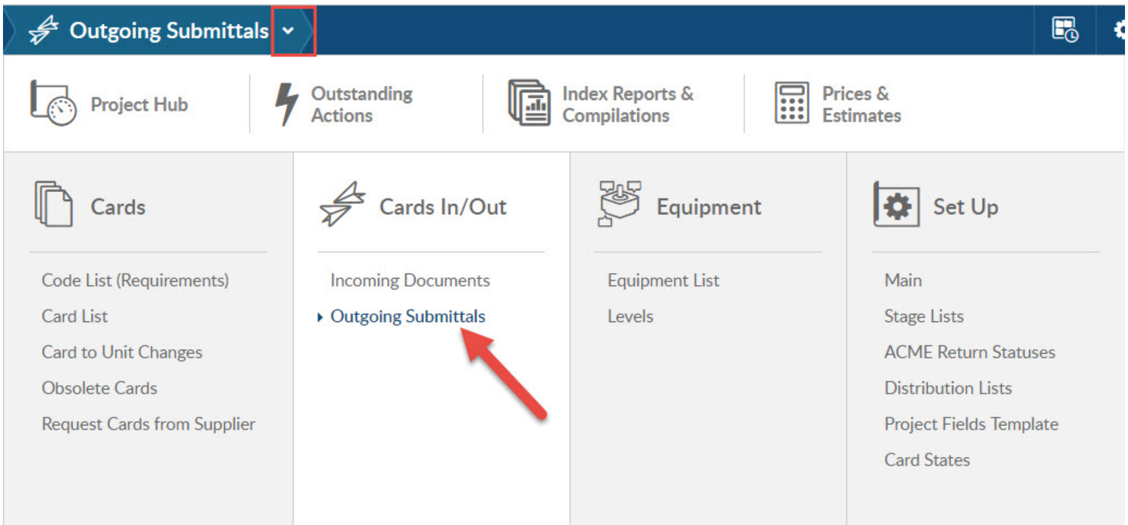
Sending documents (outgoing submittals)

09/16/2024 1:29 pm MDT

Documents that are available for submission (based on workflow) will automatically move to a queue located on the outgoing submittals screen. The grid in which they appear depends on the workflow target. By default, it is the customer.

To Get Here:

1. *Outgoing Submittals*



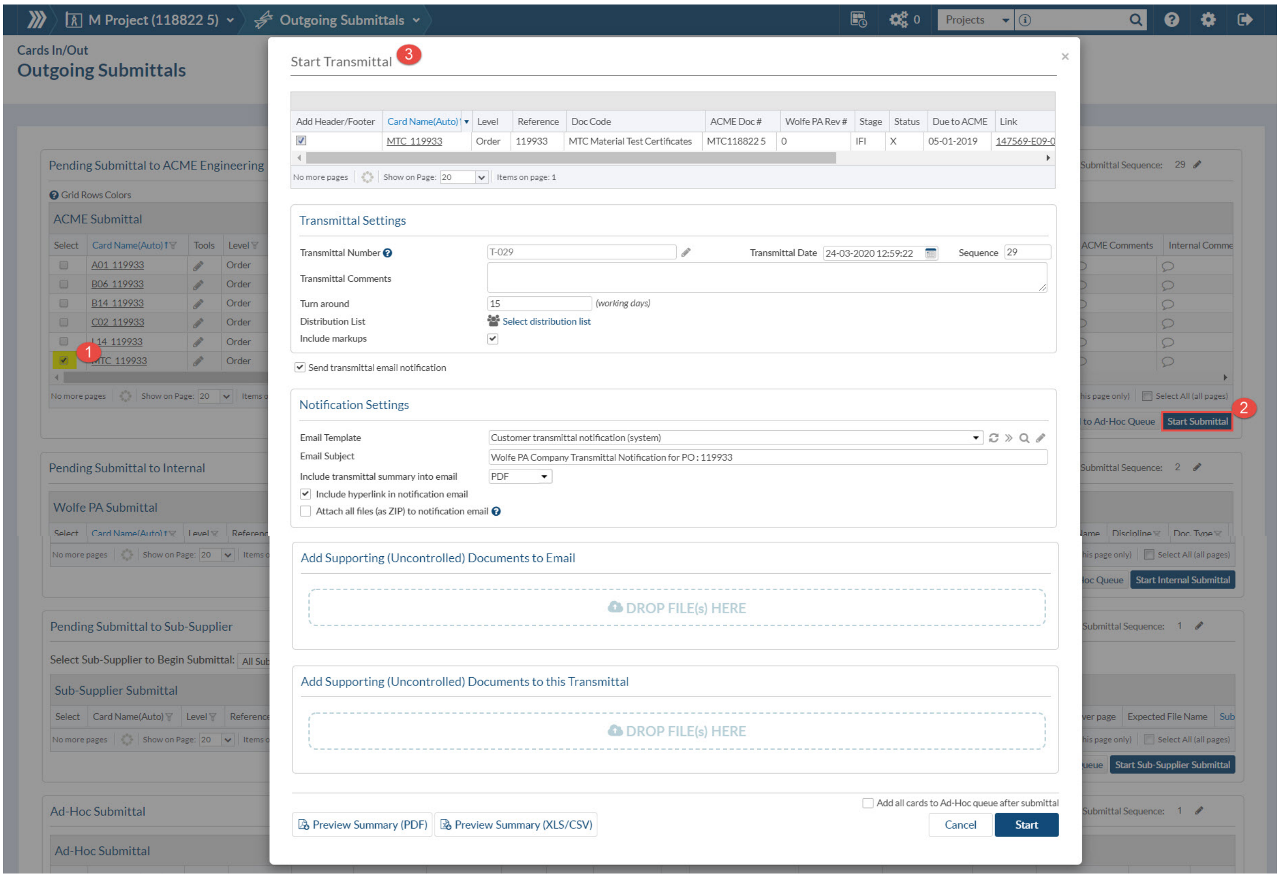
You will see five Grids. The top four are considered the "pending" queues, they will contain the documents that are available for submission (you still have to issue the submittal). The bottom grid is the actual submittals that have been issued and will populate once transmittals have been generated.

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

- Customer Submittals
- Internal Submittals
- Sub-Supplier Submittals
- Ad-Hoc Submittals

When a document is ready for submission it will move to one of your pending transmittal queues. Once a document has been included in a submittal, it is removed from the "pending" grid.

Step 1 Place a check mark in the select column beside the documents you wish to transmit. Step 2 Click the start Transmittal button. Then a pop-up will appear allowing you to enter applicable details regarding the submission



When creating your transmittal DocBoss auto-populates the following fields: (You can change/edit these as applicable)

Transmittal Settings

- **Transmittal Number** – Based on setting
- **Transmittal Date** – Current Date
- **Sequence** - If you are using the Transmittal Number as a sequential value, this is the value it pulls
- **Transmittal Comments** – These will appear as comments on your generated transmittal (where they are located is dependent on your transmittal template)
- **Turn around** (working days), this is the number of days that is used to calculate when you expect these documents to be returned.
- **Select distribution list** – Click on this link to set who you want to send your email to. To know more about distribution lists click here.
- **Include markups** - Option to include markups on documents, if applicable
- **Send email to recipients** – This is if you want it to be sent as an email from DocBoss or not

Notification Settings

- **Email Type** – Normal (submittals include multiple cards) or Each (ONE CARD per one submittal).
- **Email Template** – This give you the option to change the email template or edit the email body text from the selected template. If you wish to know more about creating and editing an email template click here to read the complete article.
- **Email Subject** – Edit the email subject if needs to be different from the selected Email Template.
- **Include a hyperlink in the notification email** – If you are using DocBoss to email your submittal you can insert a link that will allow customers to click and download the submittal.

    - As default, the link remains active for seven days (you can change this setting). Once it is no longer active an actions button appears so you can reactivate the link for situations where your customer has not had time to retrieve the documents.
- **Attach all files (as ZIP) to notification email** - Default is set to include a hyperlink but this can be changed to attach all files as individual attachments or as ZIP. To know more about attaching files directly to the email and file limit size click **here**.
- **Upload files on email pop up**. If your customer wants you to take a screenshot of the uploaded submittal, and submit as part of your email, you can now add files directly to the outgoing email.
- **Upload files on transmittal pop up**. Add Supporting (Uncontrolled) Documents to this Transmittal

Step 3 Once you have entered all applicable information, click start.