Sending documents via Ad-Hoc

08/21/2024 8:06 am MDT

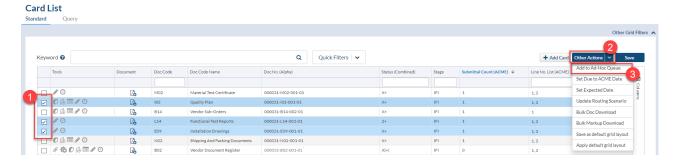
Ad-Hoc submittals are special, in that they do NOT affect the workflow of your documents. It is simply a way to get documents to anyone outside the company, recording they were sent, and leaving the status/stage etc unaffected.

They should be reserved for limited use - often the best solutions are to add workflows (via stage lists) to your documents.

To send documents via an Ad-Hoc submittal:

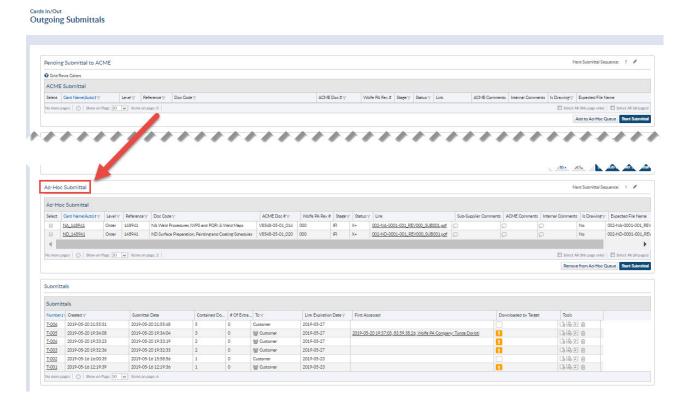
Step1:

Navigate to the cards list, and select the documents you wish to send, and click Other Actions > Add to Ad-Hoc.



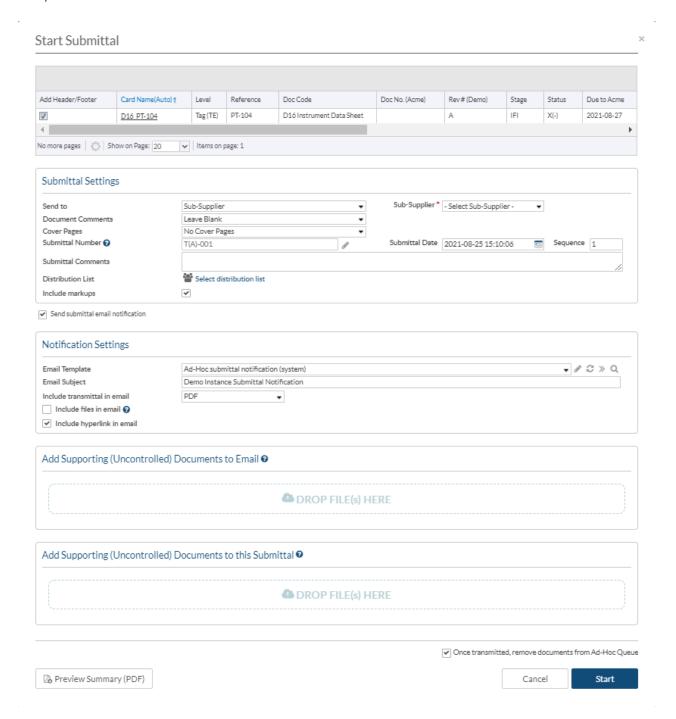
Step 2:

Navigate to outgoing submittals screen, choose the documents in the Ad-Hoc grid and click Start Submittal.



Step 3:

Complete Submittal details



Note: If you choose to Add New Cover Page the cover page will be applied based on who you are sending the Ad-Hoc to. If you are sending the submittal to your customer, DocBoss will apply the Customer Cover Page defined in your project Main page, if you are sending to your sub-supplier, DocBoss will apply the Sub-Supplier Cover Page defined in your Output Templates.