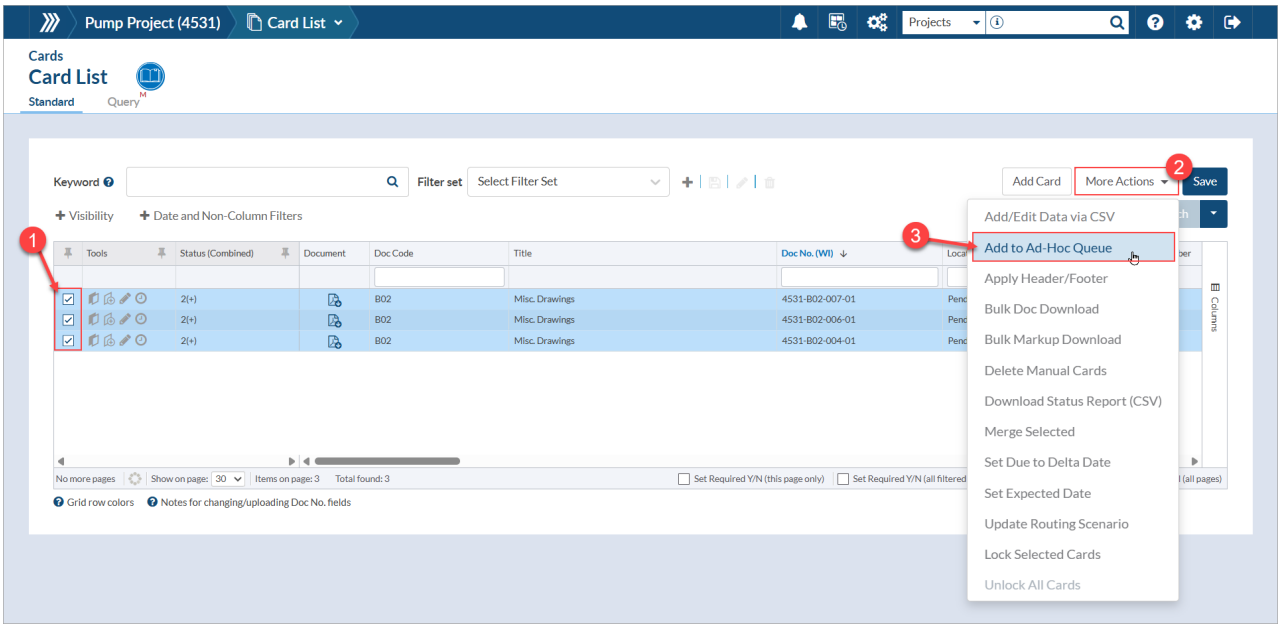
Sending documents via Ad-Hoc

09/28/2026 9:00 am MDT

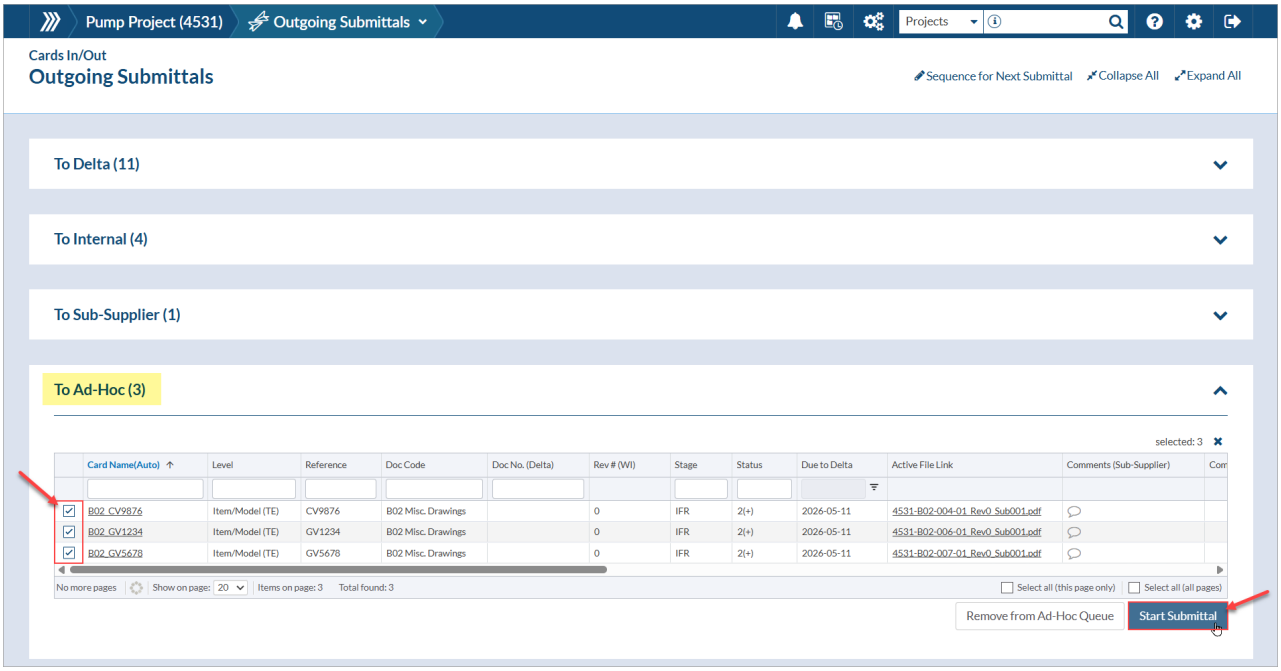
Ad-Hoc submittals are special in that they do NOT affect the workflow of your documents. It is simply a way to get documents to anyone outside the company, recording they were sent, and leaving the status, stage, etc. unaffected.

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

To add documents to the Ad-Hoc submittal queue, navigate to **Project Menu > Cards > Card List** and select the documents you wish to send. Then, expand the options under "More Actions" and choose "Add to Ad-Hoc Queue".



To start an Ad-Hoc submittal, navigate to **Project Menu > Cards In/Out > Outgoing Submittals** and scroll down to the "To Ad-Hoc" section. Choose the documents you wish to send in the grid, and click "Start Submittal"



From the "Start Submittal" form, select the distribution list and adjust the submittal settings as needed. See the following articles for more information:

- Sending Documents (Outgoing Submittals)
- Options for outgoing (submittal) notification emails
- Distribution Lists

When you're ready to send, click "Start (and Send Email)".

> Note: Because Ad-Hoc submittals are not part of the regular document workflow, they do **not** appear in the sub-supplier/customer portal and can only be accessed via the email sent to the applicable contacts.