

Sending documents via Ad-Hoc

12/09/2025 1:15 pm MST

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:

Step 1:

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

Card List
Standard Query

The screenshot shows a table with columns: Tools, Document, Doc Code, Doc Code Name, Doc No. (Alpha), Status (Combined), Stage, Submittal Count (ACME), and Line No. List (ACME). The first five rows are selected. A dropdown menu is open over the 'Other Actions' button, with 'Add to Ad-Hoc Queue' highlighted. Red circles 1, 2, and 3 mark the selection checkboxes, the 'Other Actions' button, and the 'Add to Ad-Hoc Queue' option respectively.

Tools	Document	Doc Code	Doc Code Name	Doc No. (Alpha)	Status (Combined)	Stage	Submittal Count (ACME)	Line No. List (ACME)
<input type="checkbox"/>		M02	Material Test Certificate	000031-M02-001-01	X+	IFI	1	1.3
<input checked="" type="checkbox"/>		Q03	Quality Plan	000031-Q03-001-01	X+	IFI	1	1.3
<input checked="" type="checkbox"/>		B14	Vendor Sub-Orders	000031-B14-002-01	X+	IFI	1	1
<input checked="" type="checkbox"/>		L14	Functional Test Reports	000031-L14-001-01	2+	IFI	1	1.3
<input checked="" type="checkbox"/>		E09	Installation Drawings	000031-E09-001-01	X+	IFI	1	1.3
<input type="checkbox"/>		M02	Shipping And Packing Documents	000031-M02-001-01	X+	IFI	1	1.3
<input type="checkbox"/>		B02	Vendor Document Register	000031-B02-001-01	X(+)	IFI	0	1.3

Step 2:

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

Cards In/Out
Outgoing Submittals

The screenshot shows two submittal grids. The top grid is 'ACME Submittal' and the bottom grid is 'Ad-Hoc Submittal'. A red arrow points from the 'Add to Ad-Hoc Queue' button in the ACME grid to the 'Ad-Hoc Submittal' grid. The 'Ad-Hoc Submittal' grid has a red box around its title. The 'Ad-Hoc Submittal' grid contains two rows of data.

Select	Card Name/AutoID	Level	Reference	Doc Code	ACME Doc #	Wolfe PA Rev #	Stage	Status	Link	Sub-Supplier Comments	ACME Comments	Internal Comments	Is Drawing?	Expected File Name
<input type="checkbox"/>	NA_148941	Order	148941	NA Weld Procedures (WPS and PQR) & Weld Maps	V8548-05-01_034	000	IFI	X+	002-NA-0001-001_REV000_SUB001.pdf				No	002-NA-0001-001_REV
<input type="checkbox"/>	ND_148941	Order	148941	ND Surface Preparation, Painting and Coating Schedules	V8548-05-01_020	000	IFI	X+	002-ND-0001-001_REV000_SUB001.pdf				No	002-ND-0001-001_REV

Step 3:

Complete Submittal details

Start Submittal

Add Header/Footer	Card Name(Auto)	Level	Reference	Doc Code	Doc No. (Acme)	Rev # (Demo)	Stage	Status	Due to Acme
<input checked="" type="checkbox"/>	D16 PT-104	Tag (TE)	PT-104	D16 Instrument Data Sheet		A	IFI	X(-)	2021-08-27

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Submittal Settings

Send to	<input type="text" value="Sub-Supplier"/>	Sub-Supplier *	<input type="text" value="- Select Sub-Supplier -"/>
Document Comments	<input type="text" value="Leave Blank"/>		
Cover Pages	<input type="text" value="No Cover Pages"/>		
Submittal Number	<input type="text" value="T(A)-001"/>	Submittal Date	<input type="text" value="2021-08-25 15:10:06"/> Sequence <input type="text" value="1"/>
Submittal Comments	<input type="text"/>		
Distribution List	<input type="text" value="Select distribution list"/>		
Include markups	<input checked="" type="checkbox"/>		

Send submittal email notification

Notification Settings

Email Template	<input type="text" value="Ad-Hoc submittal notification (system)"/>
Email Subject	<input type="text" value="Demo Instance Submittal Notification"/>
Include transmittal in email	<input type="text" value="PDF"/>
<input type="checkbox"/> Include files in email	
<input checked="" type="checkbox"/> Include hyperlink in email	

Add Supporting (Uncontrolled) Documents to Email

Add Supporting (Uncontrolled) Documents to this Submittal

Once transmitted, remove documents from Ad-Hoc Queue

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.



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.