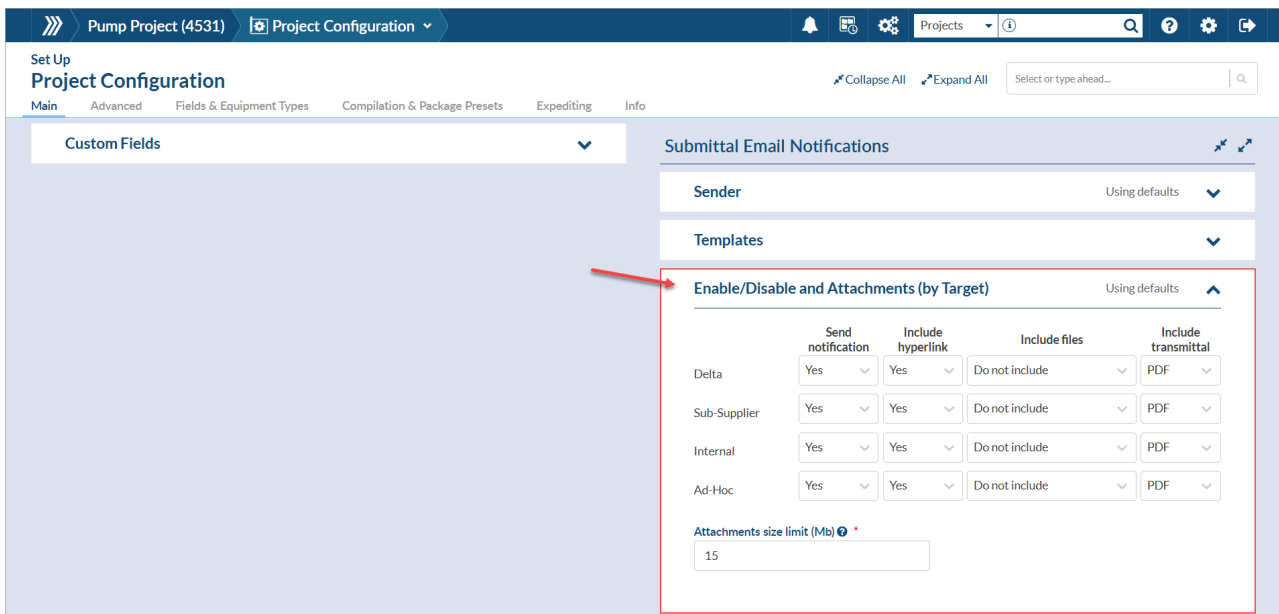


Options for outgoing (submittal) notification emails

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Submittal Defaults

The defaults for submittal email notifications (for each target) are set on the project configuration template. If these defaults should be modified on a specific project, navigate to **Project Menu > Set Up > Project Configuration > Submittal Email Notifications > Enable/Disable and Attachments (by Target)**.



The screenshot shows the 'Project Configuration' interface for 'Pump Project (4531)'. The 'Submittal Email Notifications' section is expanded, and the 'Enable/Disable and Attachments (by Target)' sub-section is highlighted with a red box and a red arrow. This section contains a table with columns for 'Send notification', 'Include hyperlink', 'Include files', and 'Include transmittal'. The 'Attachments size limit (Mb)' is set to 15.

| | Send notification | Include hyperlink | Include files | Include transmittal |
|--------------|-------------------|-------------------|----------------|---------------------|
| Delta | Yes | Yes | Do not include | PDF |
| Sub-Supplier | Yes | Yes | Do not include | PDF |
| Internal | Yes | Yes | Do not include | PDF |
| Ad-Hoc | Yes | Yes | Do not include | PDF |

Attachments size limit (Mb)

Adjust submittal settings

The default settings defined on the project can be overwritten on individual submittals using the options described below.

Send notification

The email notification can be enabled/disabled using the "Send submittal email notification" checkbox.

The screenshot shows the 'Start Submittal' interface for 'Pump Project (4531)'. The 'Email Notification' section is expanded, and the 'Send submittal email notification' checkbox is checked and highlighted with a red box and an arrow. Other settings include 'Email template' (Customer submittal notification (system)), 'Include transmittal in email' (PDF), 'Email subject' (Wolfe Instruments Submittal Notification for), and 'Include files in email' (Do not include).

Include hyperlink

If enabled, the notification email will include a hyperlink for recipients to click and download their files. This is both more secure, and more robust. When the submittal is downloaded, DocBoss time stamps the download and records the name and IP address of the recipient.

The screenshot shows the 'Start Submittal' interface for 'Pump Project (4531)'. The 'Email Notification' section is expanded, and the 'Include hyperlink in email' checkbox is checked and highlighted with a red box and an arrow. Other settings include 'Send submittal email notification' (checked), 'Email template' (Customer submittal notification (system)), 'Include transmittal in email' (PDF), 'Email subject' (Wolfe Instruments Submittal Notification for), and 'Include files in email' (Do not include).



If you would like to receive a list of the submittals which have not yet been downloaded, an automated report can be sent to your email (see article for details: Automated email reports from user profile).

Include transmittal

The format of the transmittal file (PDF, CSV/XLS, or both) can be modified from the "Include transmittal in email" field. If no transmittal file is required, select "NONE".

The screenshot shows the 'Start Submittal' interface for 'Pump Project (4531)'. Under the 'Email Notification' section, the 'Send submittal email notification' checkbox is checked. The 'Include transmittal in email' dropdown menu is open, displaying a list of options: PDF, NONE, PDF, CSV/XLS, and BOTH. A red box highlights the dropdown menu, and a red arrow points to the 'PDF' option.

Include files

If desired, files can be attached to the notification email directly (either as a single ZIP file, or as individual attachments). If your customer cannot access FTP sites (IT restrictions), this is a suitable option.

Note that an attachment size limit is required, and this limit is set on the **Project Configuration** page (see "Submittal Defaults" section above). If the size of the submittal is too large, a hyperlink will be embedded. The typical maximum for most email systems is about 15MB.

The screenshot shows the 'Start Submittal' interface for 'Pump Project (4531)'. Under the 'Email Notification' section, the 'Send submittal email notification' checkbox is checked. The 'Include files in email' dropdown menu is open, displaying a list of options: Do not include, As a single zip file, As individual attachments, and Do not include. A red box highlights the dropdown menu, and a red arrow points to the 'As individual attachments' option.




Most organizations have limits for the size of incoming emails, and large emails may be blocked. You may not receive any notification that they did not receive the files (this is managed on the customer's side, not by DocBoss).

Attach link **ONLY** if the attachments are bigger than maximum email size limit.

If attaching files to the email submittal, the [IFS_\$BIGZIP] email variables will include a hyperlink to download the files only in the case that the email is larger than the maximum size limit. The [LINK] variable within the IF statement will be hidden if the email is within the size limit.

**Note: Our default email template includes this feature.*

Example (from the default DocBoss email template):

[IFS_\$BIGZIP]  Note - the attachments for this submittal have exceeded our maximum email size limit. You can download the files directly from this hyperlink **[LINK]**, or contact us to provide an alternate transfer solution **[IFS]**.

To learn more about creating/editing email templates, see this article: [Create a New Email Template](#).
