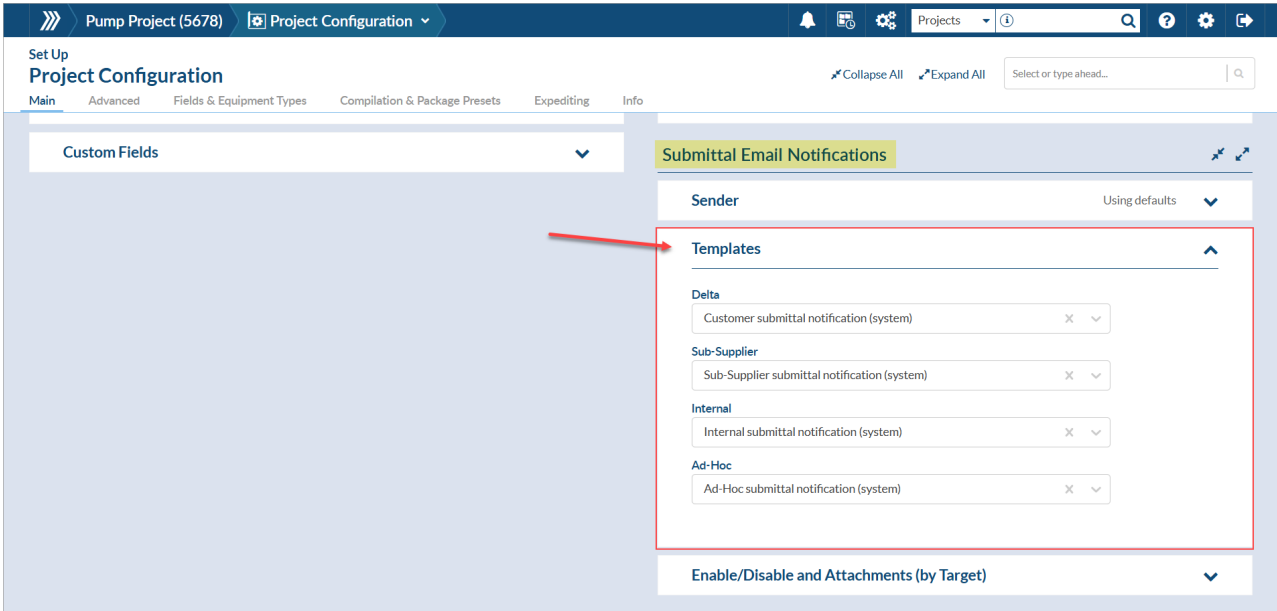


# Selecting Email Template

05/11/2026 12:15 pm MDT

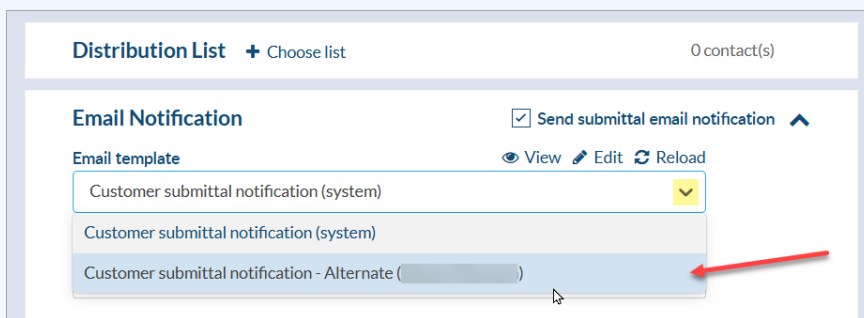
The email templates that are used when creating outgoing submittals can be defaulted on each project. To update the default email template, navigate to **Project Menu > Set Up > Project Configuration**. From the "Main" tab, navigate to **Submittal Email Notifications > Templates**.



An email template can be selected for each submittal target (i.e., customer, sub-supplier, etc.). To choose a different template, expand the drop-down and choose from the list of available templates.



Note: If a different email template should be used on a specific submittal, the template can be changed on the individual submittal before sending. This change will only apply to the submittal, and will not change the project default.



## Edit Email Template

Once you have started the submittal process, you can make adjustments to the email before sending. To do this, expand the email body section and click directly into the body of the email. For more options, click the three dots (...).

**Email Notification**  Send submittal email notification ▲

**Email template** View Edit Reload  
 Customer submittal notification (system)

**Email subject**  
 Wolfe Instruments Submittal Notification for PO : 5678

**Include transmittal in email** **Include files in email**  
 PDF Do not include

Include hyperlink in email

**Email body** ▲

↶ ↷ **B** *I* U ⋮

This is a notification email only. Please do NOT reply to this email. **[IF \$SIS\_LINK] If your download doesn't start immediately after clicking the below link, you may need to copy and paste the link directly into your browser. [IF]**  
 If you have any issues accessing this information, please notify [CONTACT\_NAME]. Contact details are listed below.

**[IF \$JOB\_VIEW] [IF] [IF \$SIS\_LINK] [IF]**

Submittal info	
<b>Project Name:</b>	[PROJECT]
<b>Submitted to:</b>	[TARGET]
<b>[PROJECT_TYPE] Number:</b>	[PO_NUMBER]
<b>Job:</b>	[JOB]



Note: Only text can be modified from the email body editor, and new variables cannot be added. If additional variable are needed, adjust the template from **System Menu > Template Mgmt > Output Templates**. Once changes are applied, restart the submittal process.

For more information, see this article: [Create a New Email Template](#).