

Selecting Email Template

09/16/2024 1:38 pm MDT

If you want, you can change the Email Template that is used for any project.

To Get Here:

Project menu - (SetUp) Main, Scroll to Output Settings

Output Settings

Stamp

ACME Stamp XLS: Default Stamp Template [XLS] (sy ▼)

Cover Pages

ACME Cover Page PDF: Example Cover Page [XLS] (Brad ▼) CSV/XLS: Example Cover Page [XLS] (Brad ▼)
Sub-Supplier Cover Page PDF: Default Sub-Supplier Cover Page ▼

Transmittals

ACME Transmittal PDF: Default Transmittal w/ Wolfe PA ▼ CSV/XLS: - No Template Selected - ▼
Sub-Supplier Transmittal PDF: Default Sub-Supplier Transmittal ▼
Internal Transmittal Uses the Sub-Supplier transmittal templates
Delivery Medium Email ▼ Show Delivery Medium in Transmittal Popup
Send transmittal email notification
Include summary into email PDF ▼
Require Name for Doc Access Yes ▼
Add Comments Page to Document on Submittal

Transmittal Numbering Format

Type of Format	Pattern per Target
ACME Transmittal Pattern	T-<Sequence###>
Sub-Supplier Transmittal Pattern	T(S)-<Sequence###>
Internal Transmittal Pattern	T(I)-<Sequence###>
Ad-Hoc Transmittal Pattern	T(A)-<Sequence###>

Transmittal Notification Emails

- Email Templates -

ACME	Customer transmittal notification ▼	Ad-Hoc	Ad-Hoc transmittal notification (s) ▼
Sub-Supplier	Sub-supplier transmittal notificat ▼	Internal	Internal transmittal notification (s) ▼

- Email Settings -

Email FROM Address Use DO-NOT-REPLY@docboss.c ▼
Contact Info Use User Email Address ▼
 Include hyperlink into email

Other

Estimation Default Estimate Template (system) ▼

The drop-down (beside each Type of submittal) lists the available templates you have in your system. Once a template is selected you can always make changes prior to sending.

Edit Email Template

Once you have started your submittal process you can edit the email notification.

Click the "Load Email Body Editor" icon

Transmittal Settings

Transmittal Number ? ✎ Transmittal Date 📅 Sequence

Transmittal Comments

Turn around (working days)

Distribution List [Select distribution list](#)

Include markups

Send transmittal email notification

Notification Settings

Email Template ↻ ⌵ 🔍 ✎

Email Subject

Rich Text Editor:

ABC - [Icons: Undo, Redo, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Text Color, Background Color, Font Size, Font Family, Source]

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.

Transmittal info	
Project Name:	[PROJECT]
Submitted to:	[TARGET]
[PROJECT_TYPE] Number:	[PO_NUMBER]
Job:	[JOB]

Include transmittal document inside notification email ⌵

Include hyperlink in notification email



You can then click directly into the body and make any desired changes. You can not add new variables from here. That can only be done at the Admin level when setting up the Template- [click here](#).