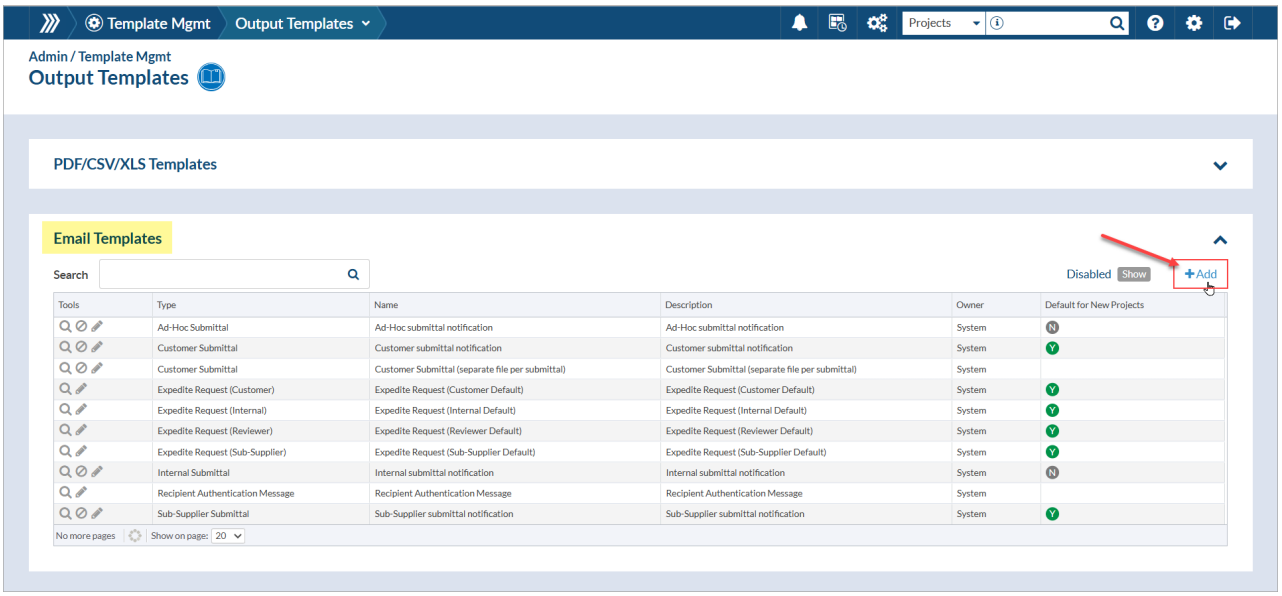
Create a New Email Template

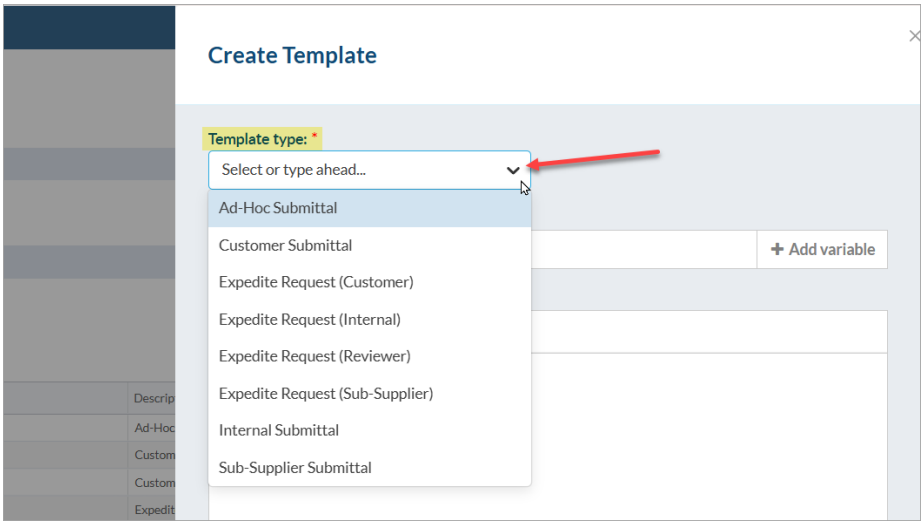
09/14/2026 12:31 pm MDT

Email templates are used to automatically fill in the body of email notifications, including submittal emails and expedite request emails. To create an email template, navigate to **System Menu > Template Mgmt > Output Templates.** From the "Email Templates" section, click the "+ Add" button.



Template type

DocBoss email templates are specific to a given scenario (submittal / expedite request) and target (customer, sub-supplier, etc.). Select the email template that you would like to create, and which target it applies to.

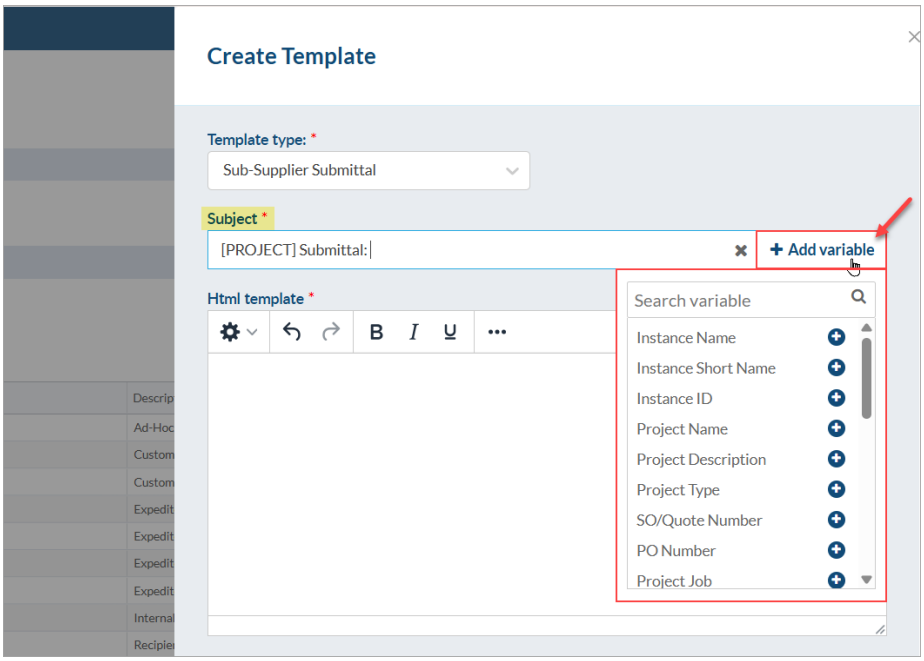


Variables

DocBoss pulls information from your project into the email using variables. Variables can be added into the subject line as well as the email body.

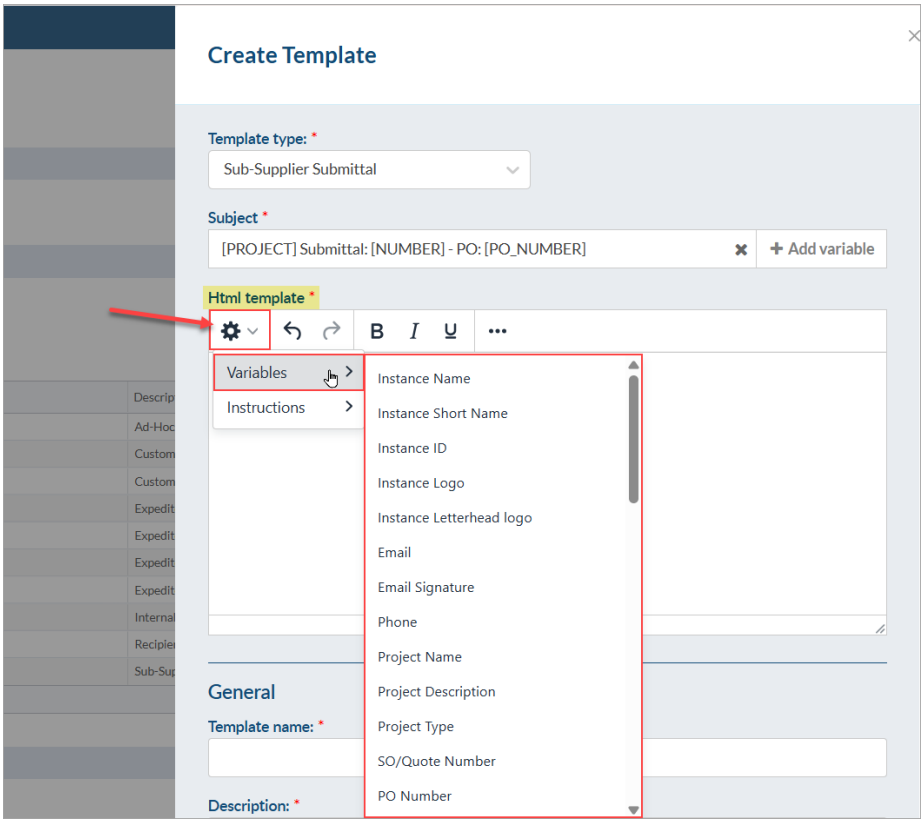
Subject line

Enter a subject line using a combination of text and variables. To add a variable to the subject line, click the "Add variable" button and choose from the list of available options.

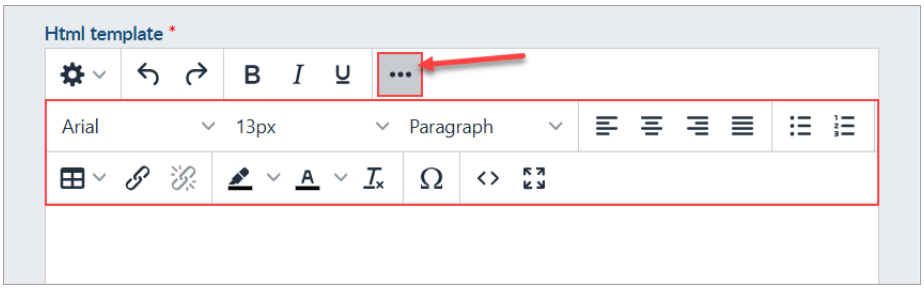


Email body

Enter the email body using a combination of text and variables. To add a variable to the subject line, click the "Add variable" button and choose from the list of available options. There are also IF statements available under the "Instructions" tab (if required).



For additional customization options (such as text formatting, bulleted lists, tables, etc.), click the three dots (...). Note that the email body can be created using any type of HTML formatting that is desired (font size, font family, etc.). For more information about editing the email templates, see this article: Formatting HTML email templates (and signatures).



Note: If your customer requires every file to be issued as a separate submittal, a unique email template is required. For more information, see this article: Send a Separate Submittal per File (Batching).

Once an email template has been created, you can select it for use on your project.
See this article for next steps: Selecting Email Template.