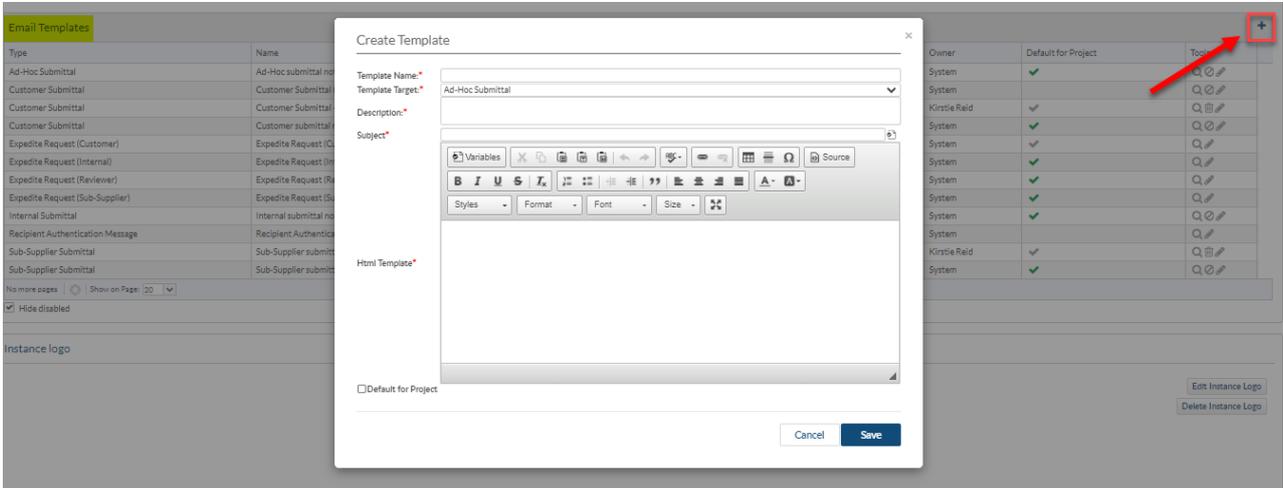


Create a New Email Template

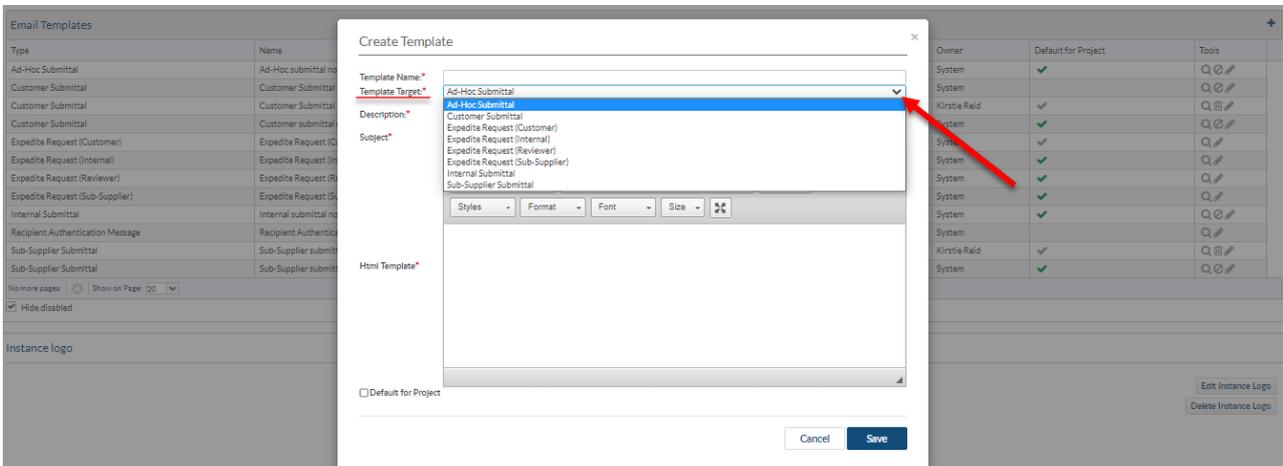
08/07/2024 7:13 am MDT

To Get Here: Settings>Template Mgmt: Output Templates > Scroll down to Email Templates



Template Type/Target

DocBoss email templates are specific to a given target. Please select the target for your email.

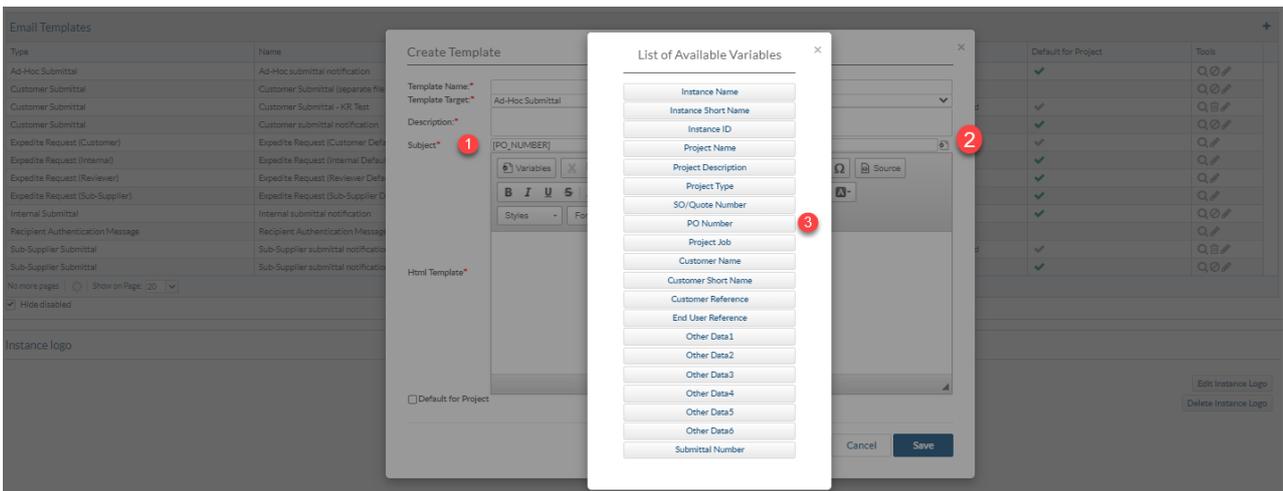


Variables

Generally, submittals include multiple cards, therefore variables are restricted to project/submittal level detail. See bottom of page if you need to send one email per card, and need document specific variables for the email.

Variables for the Subject Line

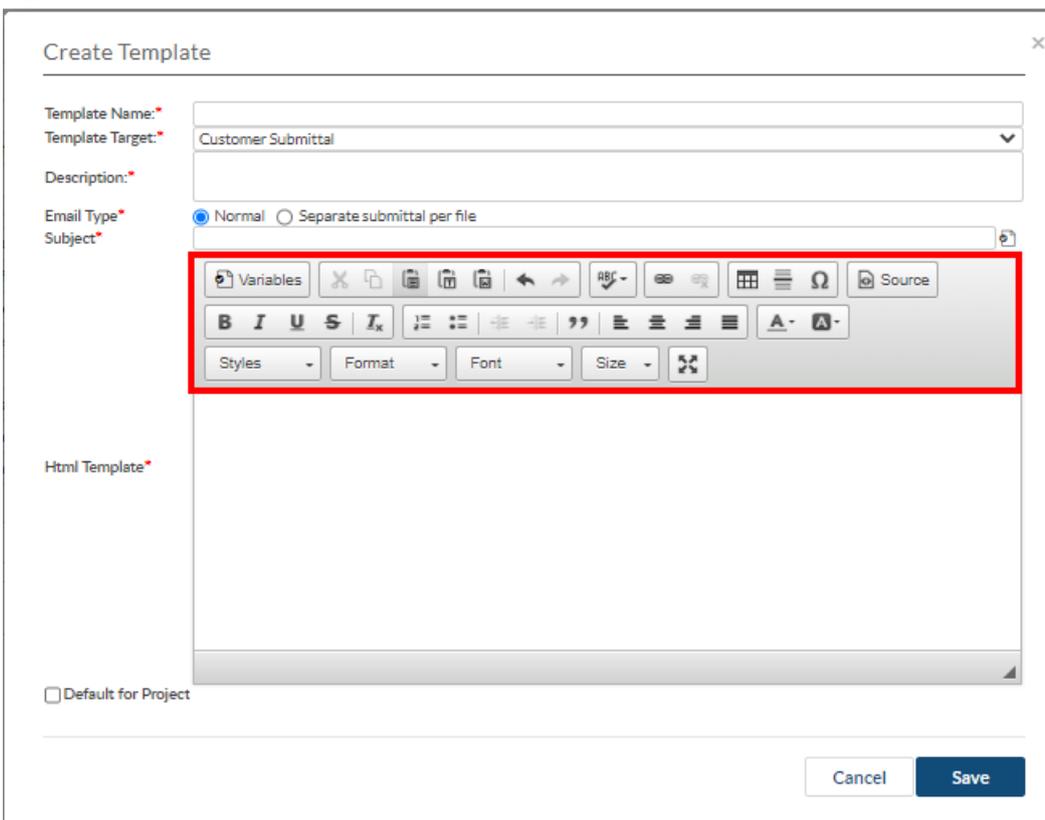
To change the default subject line, you can mix text and variables. **Note the variables for the subject line are found by clicking the icon at the end of the row.**



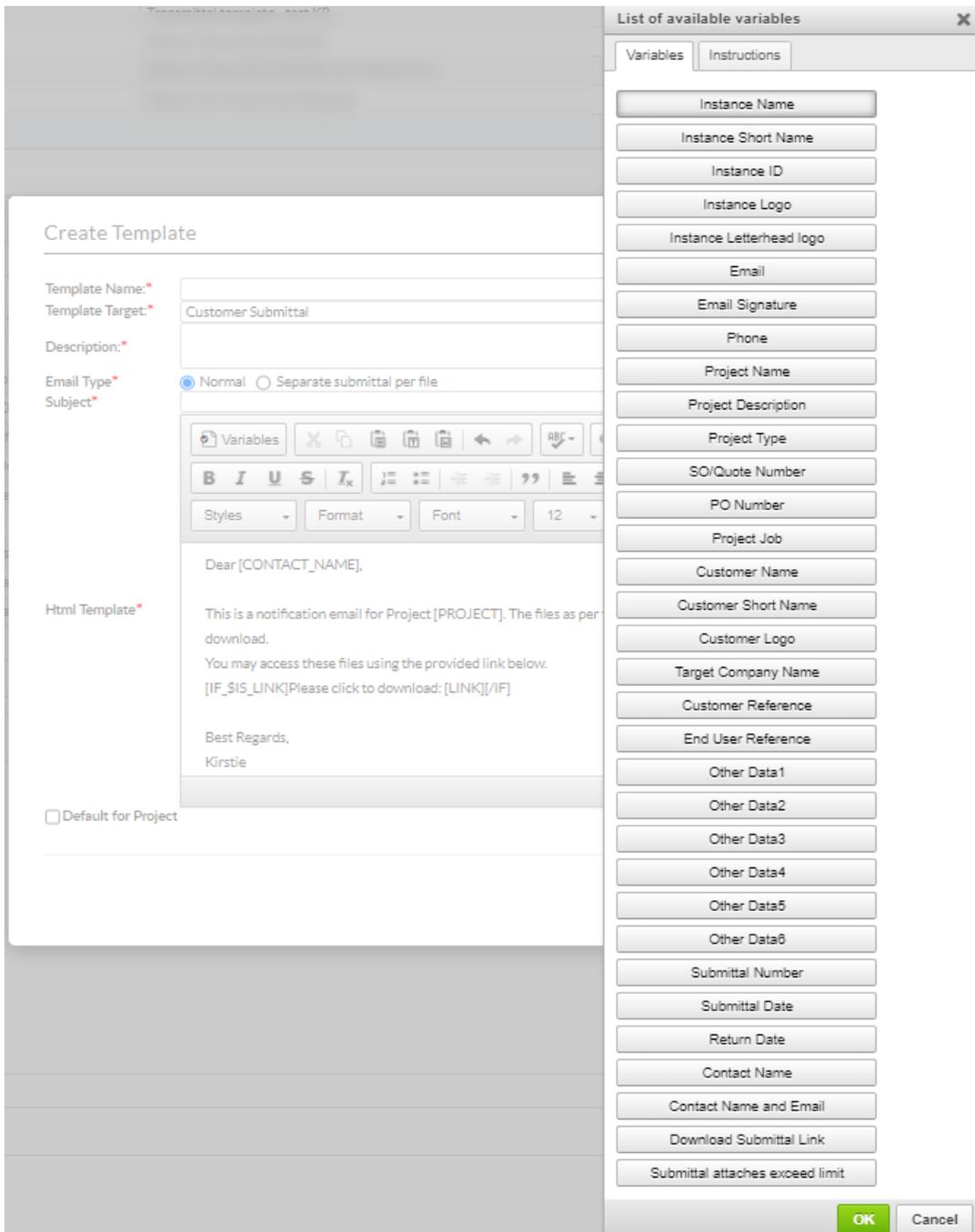
Note that a limited set of variables are available. Please contact us if you need a value which is not available.

Variables for the email body

As with the subject line, the email body can be a mix of text and variables. There are many formatting options as well.



We also recommend using variables to fill in non-static text. A list of variables can be found by clicking the variables button.



*Only the variables in the list are available. Please contact us if there is something not there that you want to use.

Text from 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 template click [here](#).

Another possibility is to create the template in Word, save as HTML, and then just copy paste.

ONE CARD per one submittal *

Some customers have an automated document processing solution in place. As a result, they require every file to be issued on a separate submittal. This can create an enormous amount of work for the supplier. In DocBoss, an option exists here (or from the outgoing submittal area) which allows the user to automate separate submittals for every file.

Create Template



Template Name:*

Template Target: Customer Submittal

Description:*

Email Type: Normal Separate submittal per file

Subject:*

Variables

Source

B I U S I

Styles - Format - Font - 12 -

Dear [CONTACT_NAME],

This is a notification email for Project [PROJECT]. The files as per the attached transmittal are available to download.

You may access these files using the provided link below.

[IF_\$IS_LINK]Please click to download: [LINK][/IF]

Best Regards,

Kirstie

Cancel

Save

[Click here for more information on Sending Separate Submittals per file](#)

Next steps:

[Select Email Template on Project](#)