

Auto-Fill Templates

04/13/2026 10:13 am MDT

Save time with auto-generated templates

DocBoss automatically fills customer-supplied forms (cover pages, transmittals, indexes, etc.) with the correct metadata, including submittal history, tag lists, and document data.

What are templates in DocBoss?



Similar to a mail merge, **templates** auto-fill information from your project into a pre-established format. Templates are used to reduce manual entry on everything from cover pages and document indexes (SDIs) to the body of submittal emails.

See how it works

This video walks through the steps of setting up a cover page template in DocBoss:

Auto-fill > Manual entry

In a matter of seconds, DocBoss fills out your templates with the applicable details in the desired format, saving you hours of manual work.



Always up to date

Templates are regenerated upon (re)submittal, ensuring the format and data reflects the latest changes.



Customize every detail

DocBoss provides a number of tools to ensure the output aligns with your requirements, such as parameters for when/how the data should appear.



Highlight changes

Would your customer like changes highlighted since the previous submittal? We can do that!

How to create an email template

It's super easy!

Step 1: Choose the target of the email (e.g., customer, sub-supplier, etc.)

Step 2: Paste the text of an existing format you follow (or write a new one)

Step 3: Replace changing values with variables

Automate your documentation

DocBoss provides automated solutions for **all** your templates. Some of the most common templates are listed below:

Cover page

DocBoss automatically applies document cover pages to submitted documents with all the necessary details. Automatically updated with each (re)submittal, the cover page can include a revision history table, equipment details, the issue purpose, and more!

Document index (SDI)

Create a full list of documentation for each project in seconds. Each document will include all relevant details, including submittal history (if desired). Need to submit the report on a recurring basis OR include documentation from multiple projects on one report? We can do that.

Transmittal

When making a submittal, a file listing each of the included documents will be generated automatically. Details about each document will be included, along with details about the submittal itself (submittal number, recipient list, etc.).

Stamp

Need to apply a stamp to your documents? Information included in the stamp can be automatically filled in for you! Documents requiring a stamp will also be clearly identified, ensuring that the requirement is met prior to submittal.

Learn how our template solutions can work for you

Book a [personalized demo](#) with one of our Product Specialists today to see how these features can be customized

to suit your company's needs.

Or, check out our other features [here](#).
