

Include a List of Documents in Submittal Notification Email

02/17/2026 4:18 pm MST

Providing a list of documents in the body of the submittal email allows the recipient(s) to know the details of the submittal without having to open the transmittal file. To achieve this, an additional sheet (tab) can be added to the [transmittal template](#), and the output can be generated in the email body.

Instructions:

1. Add a new sheet (tab) to transmittal template

To begin, download your pre-existing transmittal template from the output templates screen (**System Menu > Template Mgmt > Output Templates**). Once downloaded, add a new sheet (tab) to the template and name it "CARDLIST_FOR_EMAIL". In the new sheet (tab), create a table with the information you would like in the email (e.g., customer document number, revision, etc.), and set up a transmittal array (using the transmittal variables).

Before saving and [uploading the new template to DocBoss](#), make sure to set the print area (i.e., the range of cells that should be included in the output).

Item No.	Description	<Supplier_Short_Name > Document No.	<Customer_Short_Na me> Document No.	Revision
<Start_Documents>				
<Document	<Documents.Doc_Code>	<Documents.Supplier	<Documents.Custome	<Docum
ento No.	<Documents.Doc_Code_Name_Title	Doc_NumberAutoHigh	r Doc_NumberAutoH	ento Prim
<End_Documents>				

2. Update the email template

With the new transmittal template uploaded to the system, scroll down to the "Email Templates" section of the output templates page and click pencil icon under "Tools" to edit an existing template (OR create a new one). In the "Html template" section, click the area that you would like to add the card list (e.g., at the end of the email) and add the "Embed Card List" variable (by selecting it from the gear icon). Click "Save" to apply your changes.

Template Mgmt

Output Templates

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Output Templates

PDF/CSV/XLS Templates

Email Templates

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	Ad-Hoc Submittal	Ad-Hoc submittal notification	Ad-Hoc s
	Customer Submittal	Customer submittal notification	Custome
	Customer Submittal	Customer Submittal (separate file per submittal)	Custome
	Expedite Request (Customer)	Expedite Request (Customer Default)	Expedite
	Expedite Request (Internal)	Expedite Request (Internal Default)	Expedite
	Expedite Request (Reviewer)	Expedite Request (Reviewer Default)	Expedite
	Expedite Request (Sub-Supplier)	Expedite Request (Sub-Supplier Default)	Expedite
	Internal Submittal	Internal submittal notification	Internal s
	Recipient Authentication Message	Recipient Authentication Message	Recipient
	Sub-Supplier Submittal	Sub-Supplier submittal notification	Sub-Supp

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Instance Logo

Primary logo

Instance letterhead logo

Secondary logo

Edit Template

Template type: *
Customer Submittal

Batching *
Normal

Subject *
[INST_NAME] Submittal Notification for [PROJECT_TYPE] : [PO_NUMBER] x + Add variable

Html template *

B *I* U ...

Job:

[INST_SHORT_NAME] Submittal Number:

[INST_SHORT_NAME] Contact:

Submittal Date:

Link to download .zip:

[JOB]

[NUMBER]

[CONTACT]

[DATE]

[LINK]

Instance ID: [INSTANCE_ID]

[IFS_\$BIGZIP]Note - the attachments for this submittal have exceeded our maximum email size limit. You can download the files directly from this hyperlink [LINK], or contact us to provide an alternate transfer solution[IFS]

[CARDLIST_FOR_EMAIL]

General

Owner:
System

Cancel

Save