Distribution Lists

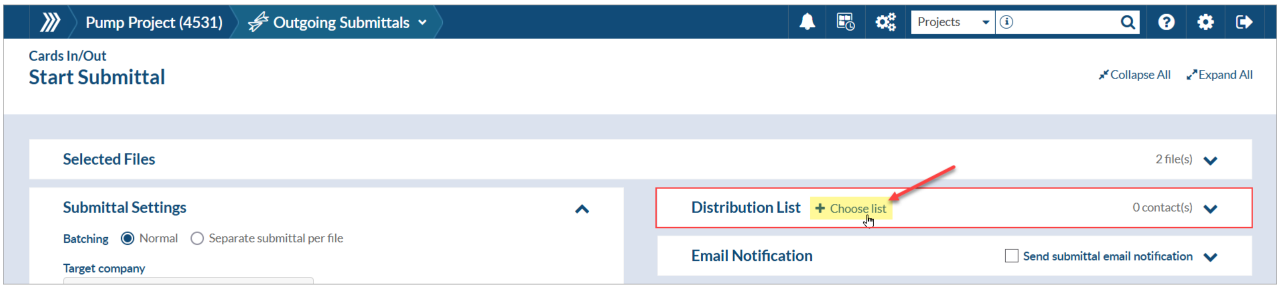
05/11/2026 12:50 pm MDT

A distribution list defines the recipients of a submittal. The list of recipients is commonly included on the transmittal summary (depending on your transmittal template).

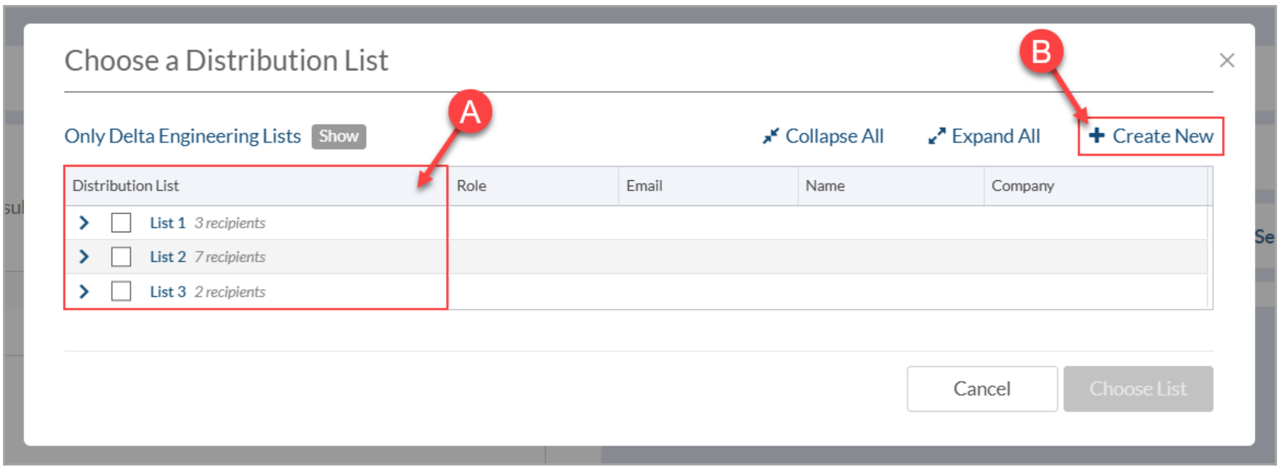
Topics

Add/apply distribution list on project

Distribution lists can be created before or during the submittal process. After starting a submittal, you can choose the distribution list by clicking "Choose list".



From the pop-up, you can choose to use previously-created list,**or** create a new one.



A. Selecting a previously defined list

1. Select list by clicking the checkbox. To see the recipients of the list, click the arrow to expand the list details.
2. Select “Choose List"
3. Review the recipients defined on the distribution list, and make adjustments if required.
    a. *Note: If you make adjustments to the list, the changes will only be applied to to the submittal in question.*

However, you can also choose to save the updated list as a ***new*** *list, if desired.*

B. Creating a new list

1. Click "Create New" and the distribution list creation form will appear.

2. Enter a name for the new list

    a. *Note: The distribution list will be made available for future submittals, and this name will appear in the grid of pre-created distribution lists*

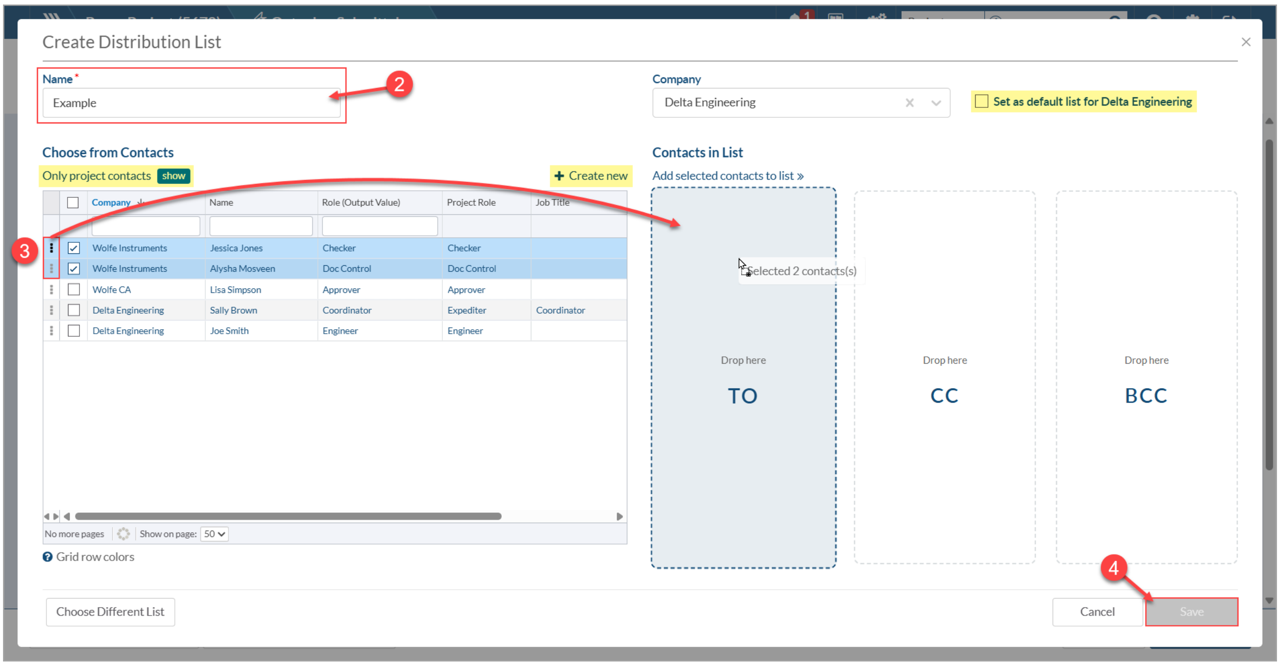
3. Choose the contacts that should be included in the distribution list. Select one or more contacts from the grid, and drag and drop them into the list according to how they should receive the email - either as a direct recipient (To), copied (CC), or blind copied (BCC). Once the contact(s) is added to the list, the way they receive the email can be adjusted from the "Type" column.

    - The contacts which are defined on your project (**Project Configuration > Main >Users and Key Contacts**) will be displayed in blue text. You can also use the "Only project contacts" filter to hide non-project contacts from the grid.

        - *Note: If a customer/end-user doc controller has been added to the project (from the* ***Customer/End User Contacts*** *section), this contact will be added to the distribution list automatically.*

    - If you need to add a recipient who is not yet on your contact list, click "Create new" to add their contact information.

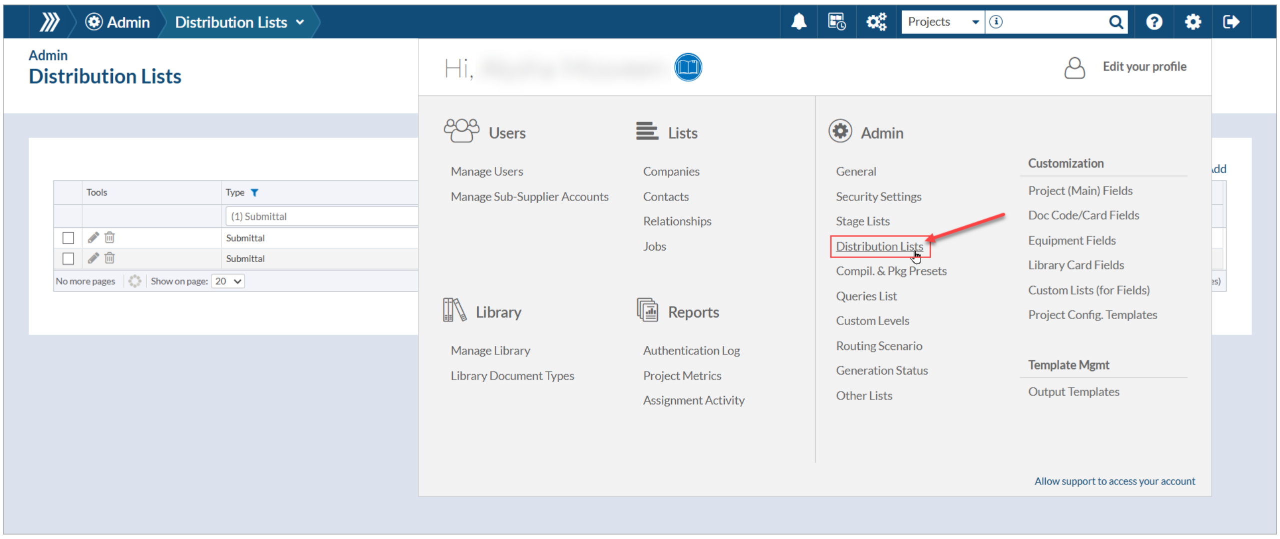
4. Click “Save” to create the list and load the recipients into the submittal.



The "Role (Output Value)" column shows the "role" value that will appear on the transmittal file if the submittal distribution list is included (and the <Distribution_TO.Role>, <Distribution_CC.Role>, or <Distribution_BCC.Role> variables are used). This will default to the job title listed on the user/contact profile. If there is no job title defined, the project role name will be used instead. If the user/contact does not have a job title defined AND are not listed on the project, this value will be blank.

Add/edit global distribution lists

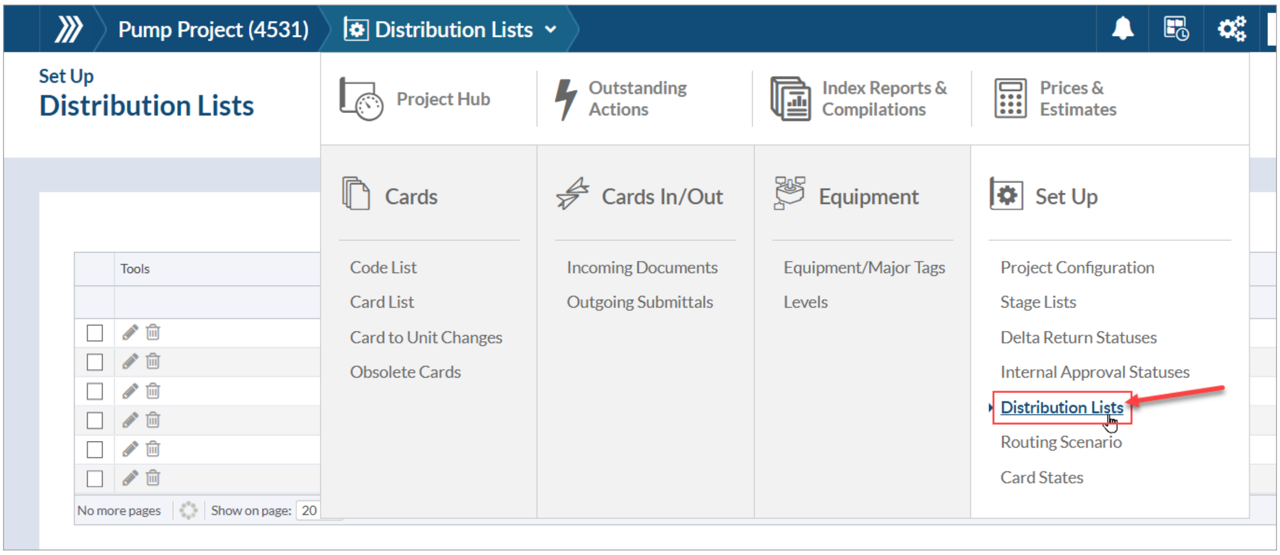
Admin users can create distribution lists under **Admin** > **Distribution Lists**. When a new project is created, all system-level distribution lists will be imported for use on submittals. System-level distribution lists can be assigned to a specific company, and when creating a submittal on a project, the list of existing distribution lists can be filtered by the target company for easier selection.



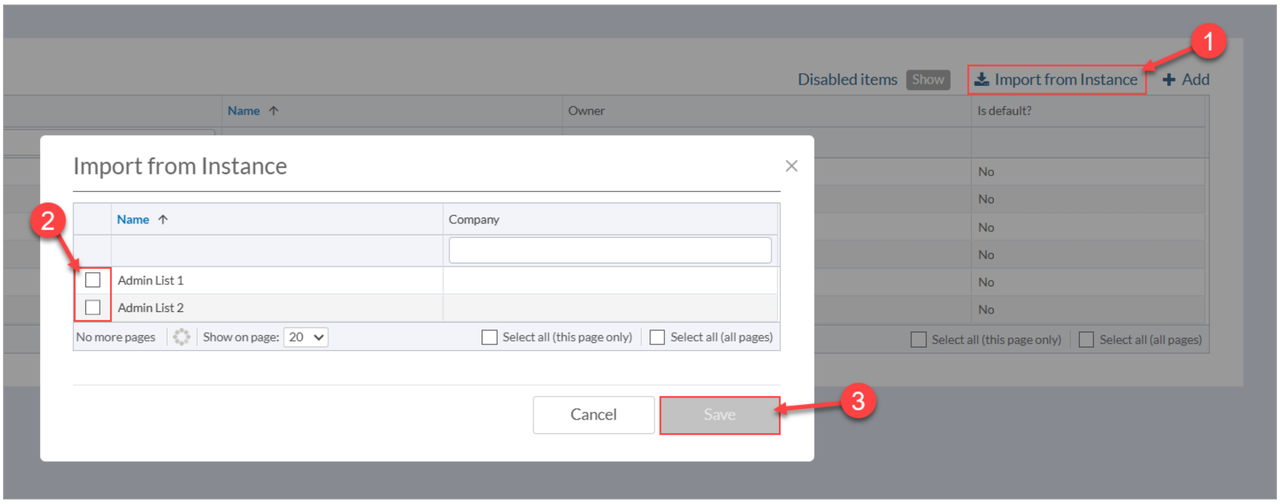
On the **Distribution Lists** screen, click the " + Add" button in the top right (above the grid) to create a new distribution list. Give the list a name, choose the applicable contacts (and how they should receive the email), and save.

Import and customize distribution lists per project

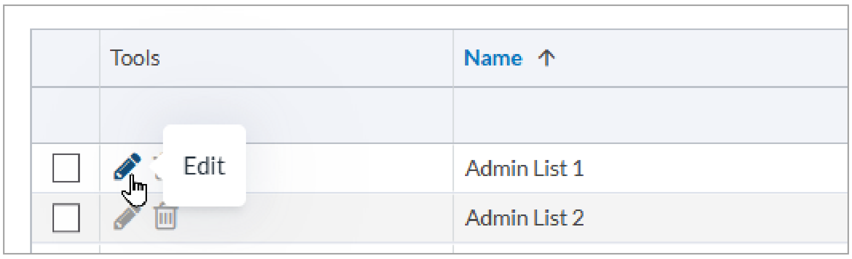
New distribution lists created at the system-level can be imported for use on existing projects. From the project, navigate to **Set Up** > **Distribution Lists**.



If the required list is not showing in the grid, users can add a new list or import from the instance (global) lists.



One imported, the name and contacts defined on the distribution list can be customized to suit the needs of that specific project (and these changes will not affect the master list saved under Admin).



Any distribution list that is no longer required can be hidden - simply select the delete icon under tools to hide individual lists, or select multiple lists and click "Hide distribution lists" in the top right (above the grid).