## **Distribution Lists**

09/16/2024 1:57 pm MDT

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

## Topics

- Add/apply distribution list on project
- Add/edit global distribution lists
- Import and customize distribution lists per project

## Add/apply distribution list on project

Distribution lists are typically created during the transmittal process. After you have started your transmittal and you are in the process of entering applicable information, there is a link "Select distribution list". If you click on this link a pop-up will appear.

The left side of the pop-up is previously created distributions lists and the right hand is where you will enter information to create a new list.

#### Selecting a previously defined list

- 1. Select it and in the right will populate with the list that has been created.
- 2. Select "Save and Apply" at the bottom of the window, this will now be the distribution list for your email.

#### **Creating a new list**

- 1. Click the add symbol in the distribution list grid
- 2. Enter a name for the new list (this is the name that will appear in the future under the Distribution Lists grid)
- 3. Select the contact names you want to include in the distribution list.
  - the top are easy add and have been populated based on the user selections you have set for your project
  - the drop down allows you to select any contact that is set up in DocBoss (remember to include contact's role)
  - you can also add a new user by clicking the add icon to the right of the Select Recipient drop down.
- 4. Once you have selected your recipients, click save in the bottom of the grid. Note this is ONLY saving your new distribution list.
- 5. Select "Save and Apply" at the bottom of the window, this will now be the distribution list for your email.



Please note that you add or update the contacts on your distribution list at any time.

### Add/edit global distribution lists

Admin users can create distribution lists under Admin > Distribution Lists. These lists will be automatically available for selection on all new projects, and can be imported into existing projects if required.

<sup>dmin</sup> istribution Lists				Hi,			Edit your profil
				Hanage Users	Companies	General	Customization
Distributions Lists				View Permissions	Contacts	Security Settings	Project (Main) Fields
Select	Name1	Type 🗑	Tools		Relationships	Stage Lists	Doc Code/Card Fields
	Customer - ACME	Submittal	10005		Jobs	Distribution Lists	Equipment Fields
	Region - Alberta	Submittal	<i>i</i> •			Compil. & Pkg Presets (List)	Custom Lists (for fields)
	Region - Ontario	Submittal	e 🗇 🛍	ETFA	Ē	Queries List	Project Templates Labels
	Sales Rep - Alex	Submittal	e 🗇	Library	Reports	Custom Levels	
	Sales Rep - Pam	Submittal	d 🗇	Manage Library	Project Metrics	Routing Scenario	
No more pages Show on Page: 20				Library Folders	Assignment Activity (By User)	Generation Status	Template Mgmt
Show hidden lists						Other Lists	Output Templates

On the **Distribution Lists** screen, select the plus icon (+) in the top right of the grid to create a new distribution list. Name the list, add the applicable contacts, and save.

Admin Distribut	tion Lists		
Distribu	tions Lists 🙎	Distribution for submittal >	
Select	Name †	Contacts 3 4	
	Customer - AC		
	Region - Alber	Select Recipient - TO CC BCC	
	Region - Ontar		
	Sales Rep - Ale	To: No Contacts are selected	
	Sales Rep - Alio	Cc: Alpha: Alice B. (Soles Rep) 🗙	
	Sales Rep - Par		
•		Bcc: Alpha: Sales Team (Shared Inbox) ( <u>Sales Team</u> ) 🗙	•
No more pag	es 🔹 Show o		only) 🔲 Select All (all pages)
Show hid	den lists	6	Hide Distribution Lists
		Cancel Sove	

# Import and customize distribution lists per project

From the project menu, select 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.

	Import from Instance			 +≛
	Import Distributions from Instance Lists			Default for
	Select	Name 1		Select All (this page only) Select All (all pages)
		Region - Alberta		Hide Distribution Lists
		Region - Ontario		The Distribution Lists
2		Sales Rep - Alex		
		Sales Rep - Alice		
		Sales Rep - Pam		
	No more pages 🌼 Show on Pag	e: 20 🗸		
		3 Save		

Distribution lists within a project can be customized to suit the needs of that specific project. (This will not affect the master list saved under Admin.)

Distributions Lists							
Select	Name	Tools					
	Customer - ACME	De 1997 🖉					
	Sales Rep - Alice	💉 🛍					
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These distribution lists are available to select for submittals on the project.

Any unrequired lists can be hidden if the user does not wish to see them - simply select the delete icon under tools to hide individual lists, or select multiple lists and click the **Hide distribution lists** button (on the bottom right of the grid).