

Distribution Lists

01/19/2026 1:48 pm MST

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

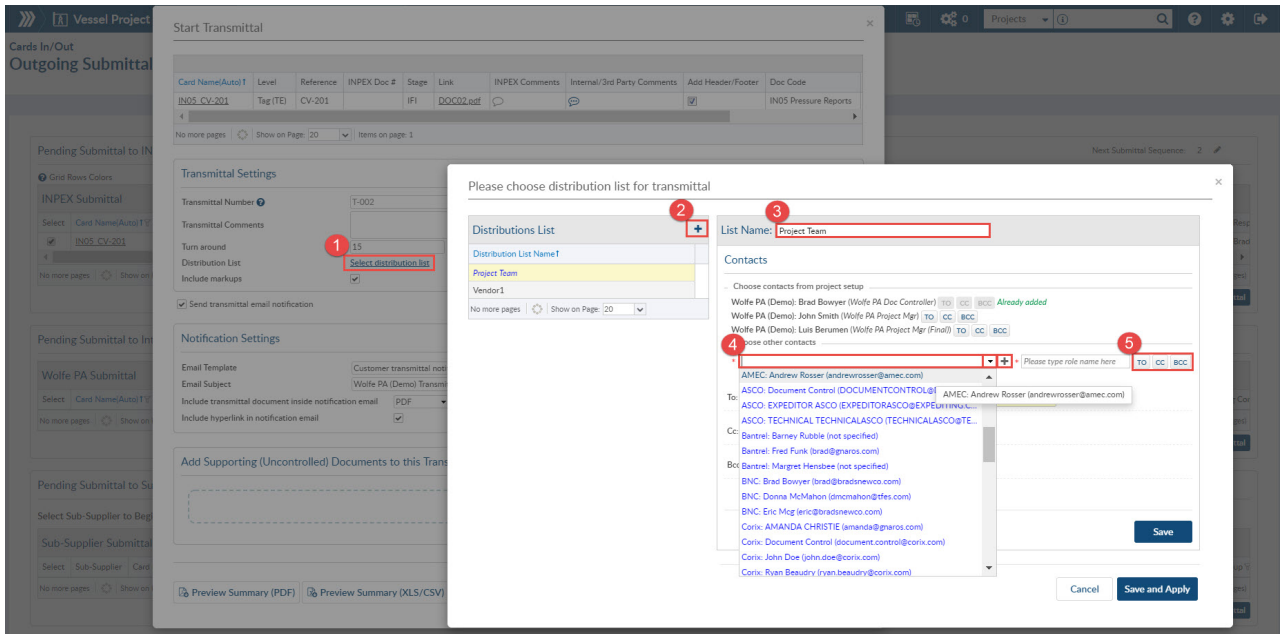
1. Select it and in the right will populate with the list that has been created.
2. Select "Save and Apply" at the bottom of the window, this will now be the distribution list for your email.

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 "quick add" contacts are populated based on those selected in the "Users and Key Contacts" section of the Project Configuration page.
 - 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**.
 - 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.

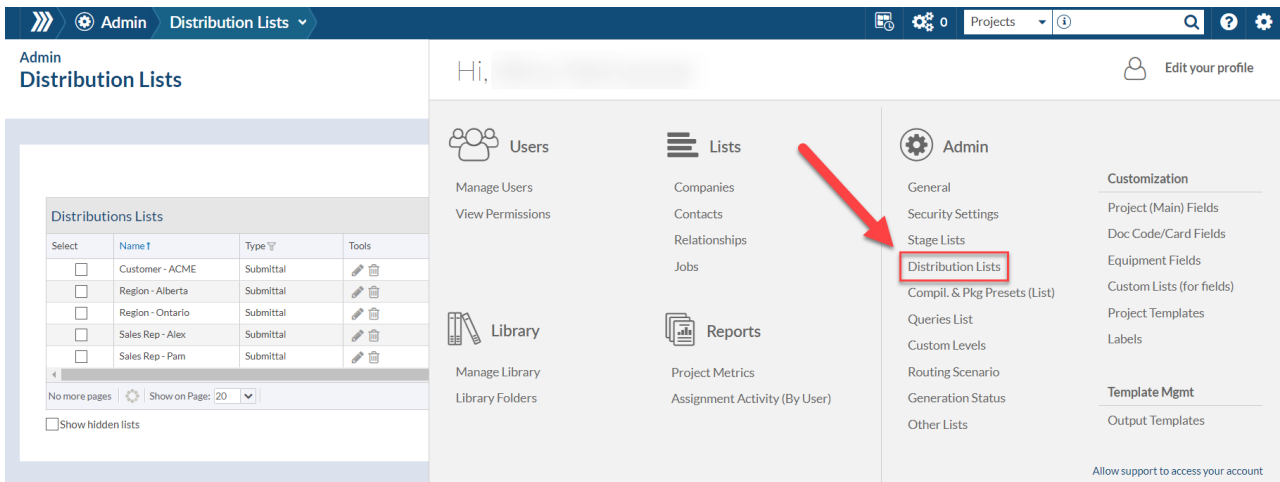
5. Select “Save and Apply” at the bottom of the window, this will now be the distribution list for your email.



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.



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
Distribution Lists

Distributions Lists

Select	Name
<input type="checkbox"/>	Customer - ACME
<input type="checkbox"/>	Region - Alberta
<input type="checkbox"/>	Region - Ontario
<input type="checkbox"/>	Sales Rep - Alice
<input type="checkbox"/>	Sales Rep - Bob
<input type="checkbox"/>	Sales Rep - Charlie

No more pages

☐ Show hidden lists

Distribution for submittal

1

2 List Name: Sales Rep - Alice

Contacts

3 + Please type role name here

4 TO CC BCC

To: No Contacts are selected

Cc: Alpha: Alice B. (Sales Rep) ✕

Bcc: Alpha: Sales Team (Shared Inbox) (Sales Team) ✕

5

Import and customize distribution lists per project

From the project menu, select **Set Up > Distribution Lists**.

» Instruments Project (000... Distribution Lists

Projects

Set Up
Distribution Lists

Distributions Lists

Select	Name
<input type="checkbox"/>	Customer - ACME

No more pages Show on Page: 20

☐ Show hidden lists

Project Hub

Outstanding Actions

Index Reports & Compilations

Prices & Estimates

Cards

Code List (Requirements)

Card List

Card to Unit Changes

Obsolete Cards

Request Cards from Supplier

Cards In/Out

Incoming Documents

Outgoing Submittals

Equipment

Equipment List

Levels

Set Up

Main

Stage Lists

ACME Return Statuses

Expedite Settings

Internal Approval Statuses

Distribution Lists

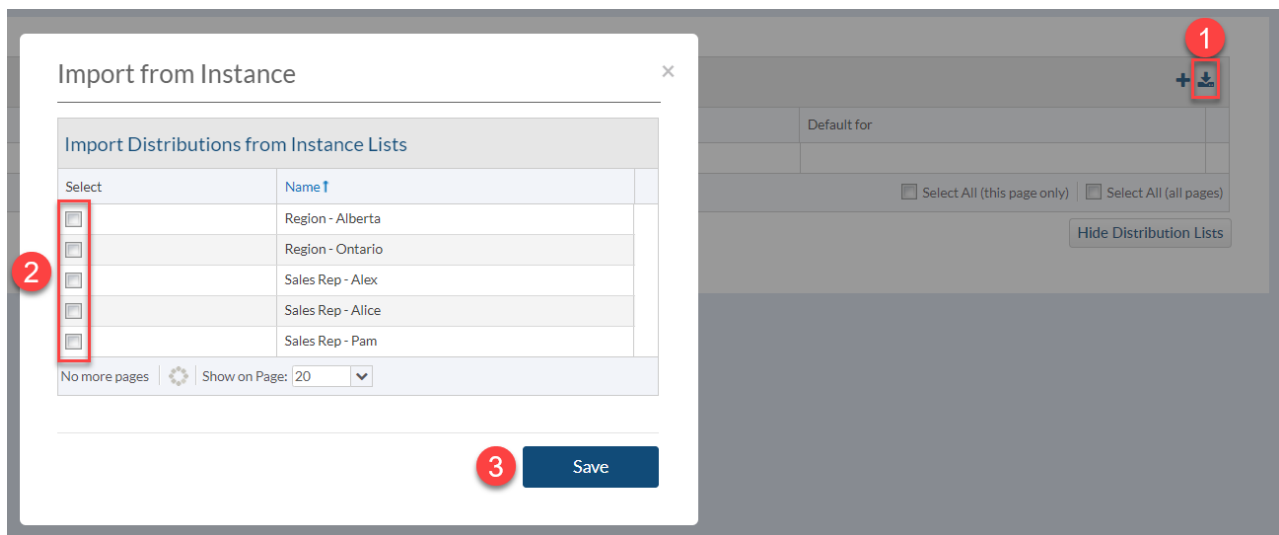
Project Template

Compil. & Pkg Presets



Routing Scenario


Card States

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



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
<input type="checkbox"/>	Customer - ACME	 
<input type="checkbox"/>	Sales Rep - Alice	 

No more pages  Show on Page: 20 

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).