

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

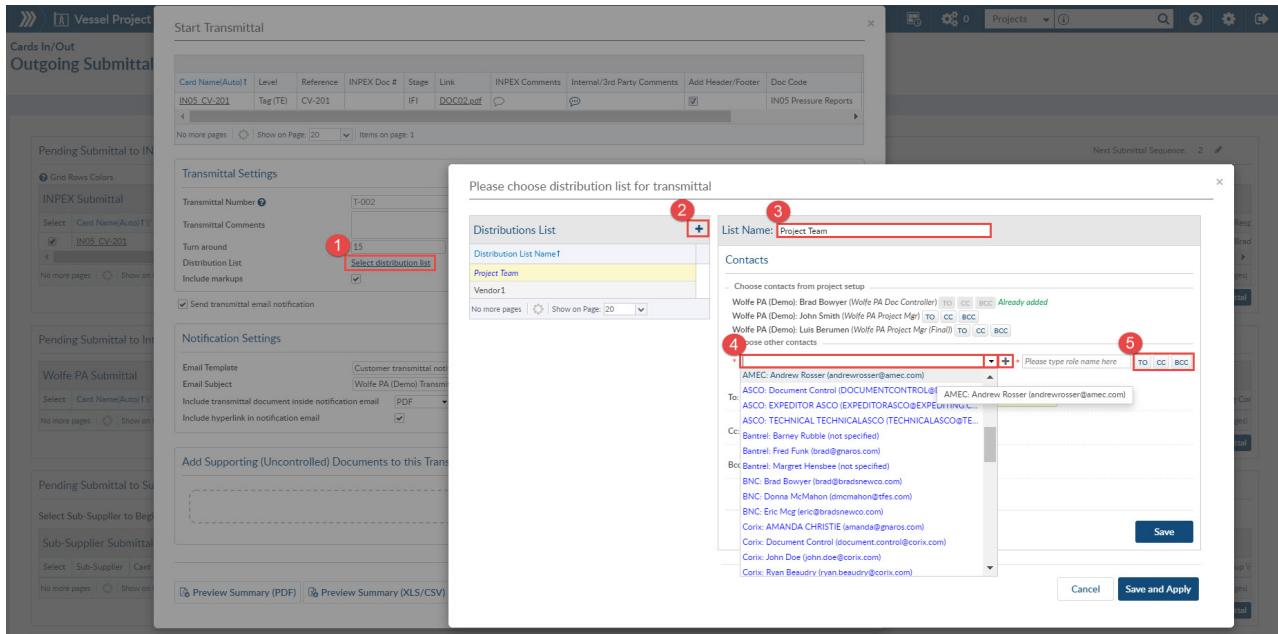
1. Select it and in the right will populate with the list that has been created.
2. Select "Save and Apply" at the bottom of the window, this will now be the distribution list for your email.

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.
 - o 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**.
 - o the drop down allows you to select any contact that is set up in DocBoss (remember to include contact's role)
 - o 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.

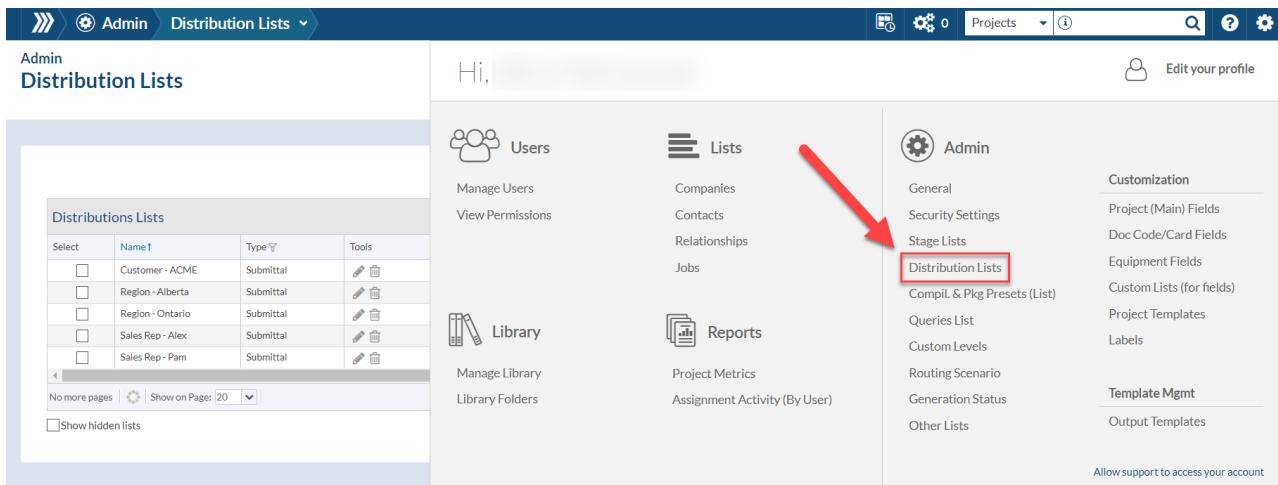
5. Select “Save and Apply” at the bottom of the window, this will now be the distribution list for your email.



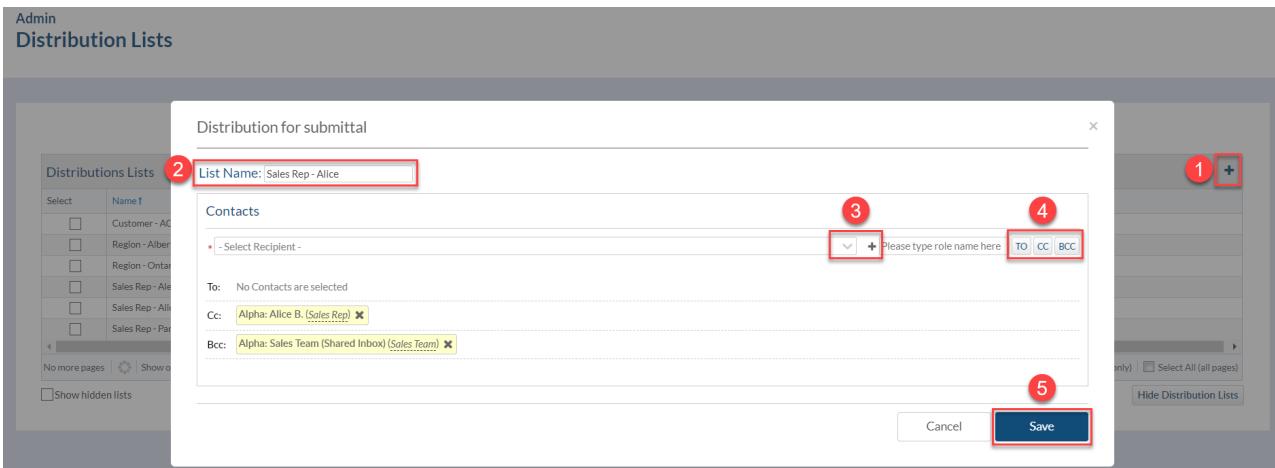
Please note that you add or update the contacts on your distribution list at any time.

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.

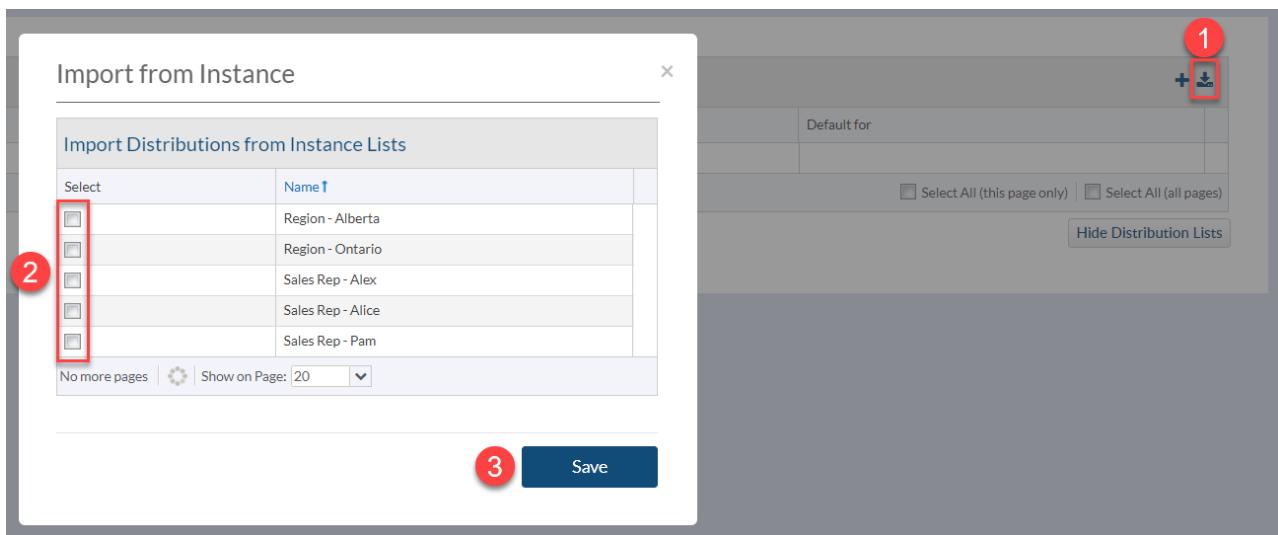


Import and customize distribution lists per project

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

The screenshot shows the 'Set Up' menu in the project header. The 'Distribution Lists' option is selected. A red arrow points to the 'Distribution Lists' option in the 'Set Up' dropdown menu on the right side of the header.

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

Select	Name
<input type="checkbox"/>	Region - Alberta
<input type="checkbox"/>	Region - Ontario
<input type="checkbox"/>	Sales Rep - Alex
<input type="checkbox"/>	Sales Rep - Alice
<input type="checkbox"/>	Sales Rep - Pam

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Default for

Select All (this page only) | Select All (all pages)

Hide Distribution Lists

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
<input type="checkbox"/>	Customer - ACME	 
<input type="checkbox"/>	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).