

# Choose Your Sharing Method

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## Be flexible in the way you share documents

Send files directly through DocBoss –no need for third-party file transfer services.



### Attach to an email

Documents can be directly embedded in the submittal email as individual attachments OR as a single zip file.



### Download from a link

Sending a large number of documents in one submittal? Provide the recipients with a link to download the files safely and securely.



### Upload to their portal

Is your customer using their own portal system? Upload a packaged zip into their portal, or integrate DocBoss directly with their system!

## How to make a submittal

It's easy!

**Step 1:** Select the documents to include in the submittal

**Step 2:** Define the recipients, and choose the document sharing method

**Step 3:** Click send

## Customize your submittal settings

DocBoss provides a number of options to meet your submittal requirements. Options can be defaulted or applied as-needed, providing optimal flexibility.

### Adjust the email

Use a templated email to pull submittal details directly from your project. Need to make additional adjustments? You can edit the email body directly before hitting send.

### No email required

If your customer is receiving documents through the portal (or you are uploading documents into their portal directly), you can choose to skip the email notification.

### Send emails from your domain

Prefer to display your email address (or a generic company email address) as the sender? We can do that!

### Settings for different targets

Sometimes, your supplier(s) and your customer ask for different things. You can manage settings for each target independently, making your submittals a breeze.

## Learn more

Book a [personalized demo](#) with one of our Product Specialists today to see how these features can be customized to suit your company's needs.

Or, check out our other features [here](#).

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