Assigning Document Distribution

Both incoming and outgoing documents can be assigned a distribution within InTouchPro – but only if incoming documents have been enabled by the InTouchPro administrator.

The distribution for each is very simple and straightforward – it is designed to mimic the way documents are often rubber stamped with a predefined list of recipients who are then generally 'ticked off' for either Action or Information.

There are a number of 'points' within InTouchPro where you can assign a distribution to a document, but they all work in much the same way.

Having located the document of interest, click on the 'Distribution…' button.

The exact label on this button will vary – dependant on whether a distribution has been created or not – the example to the right above has already had a distribution assigned.

If no distribution has been assigned, clicking on the button, will cause InTouchPro to prompt as to whether you want to use the 'Default Distribution' as a basis.


If you choose to do this, InTouchPro will take each of the users from the userlist that has selected 'Dist', 'Action' or 'Info'. If the user has selected 'Action' or 'Info, InTouchPro will mark the document distribution automatically the same way – for those with 'Dist' selected, InTouchPro will add the user to the distribution temporarily – and expect you to select 'Action' or 'Info' yourself.

In the example above you can see that the user DMM has been included in this way, awaiting selection of 'Action' or 'Info'.

To add another recipient to the list, simply select the user from the drop down list by the bottom-left corner of the form, then click on the 'Add recipient' button.
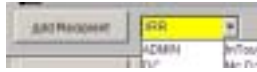
When you do this, you will need to check one of the 'Action' or 'Info' options – or the recipient will be removed when you leave the document distribution form.

To delete a recipient, simply click on the 'Delete Recipient' button.