

Can my customer use DocBoss to markup documents?

08/02/2024 3:40 pm MDT

We've had customers ask if their customers might use the review functions - avoiding submittals entirely. Here are our thoughts:

1. The routing doesn't have the same level of historical reporting.
 - With submittals, the date out, date returned etc is all built into templates. While the data exists for routing (how long each user had the document), it isn't built for reporting/inclusion in templates.
 2. There is no "approval" status for actions/routing
 - Routing assignments are simply complete/not complete. If you route to the customer as "role2" for example - we only track whether role2 has "finished" their review, not whether role2 has "approved" the document. You will lose the customer status field, making it hard to see what work is approved/not approved. Our searches are heavily centralized on status. the status can be manually updated from the card list, but not sure if possible from the "actions" interface
 3. Re-routing would be an entirely manual process.
 - Assuming you are role4, and you make the changes requested by the customer. At that point - you would need to reset the routing back to role2. that isn't an automatic process, so if you forget - the document would never get returned to the customer. Our current workflow (based on customer status) forces that return.
 4. The customer does not have a copy of the documents.
 - Everything is within the Instance environment.
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