# **Edit the Routing of a Card**

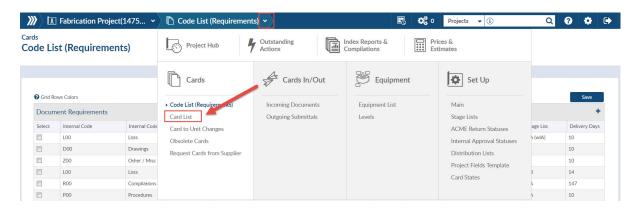
10/21/2025 11:49 am MDT

During the course of managing cards you define routing and transmittal requirements. This is typically managed by DocBoss as you upload documents to the system because you have already assigned your specific workflow instruction.

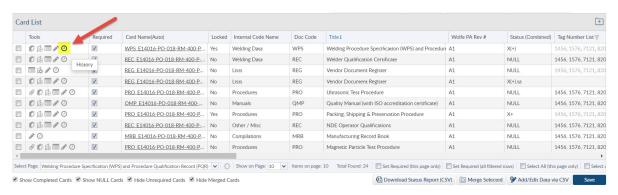
However - Once you have processed a document, you may need to edit the workflow you have designed.

#### Maybe you have:

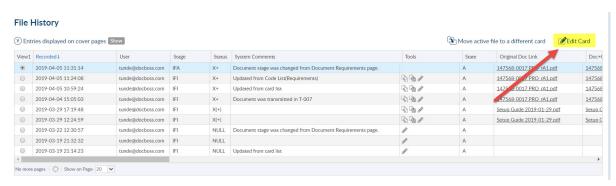
- queued a document for transmittal to your sub-supplier, but instead want it to go to the customer
- routed a document to the wrong technical resource
- etc..



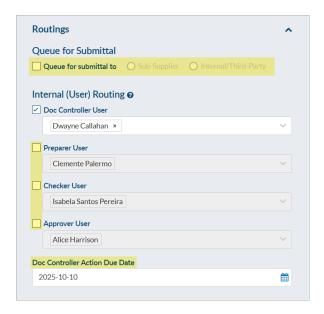
#### Step 1 Navigate to the history of the card



### Step 2 Click on the Edit icon



#### Step 3 Make required edits to the workflow process



If you have many updates to make, you can bulk update routing and meta data on the Card List screen (routing updates must be done via CSV).

Note: You do not have to select Queue for transmittal to "Internal" just because you are using the Internal (User) Routing function. If the document is continuing to queue into your "pending transmittal internally" even after all outstanding actions have been completed then you probably have it selected.

You also have the ability to manage which history records are included as output variables along with the ability to revert to previous records.

If using routing scenarios, these can be applied to individual cards. The scenario will override the routings that were previously on the card, but will not affect its queue location.

## **Reverting a Document**

You have the ability to revert a document to a previous revision at anytime throughout the process.

Click on the icons under the Tools column on applicable history entries.

Option 1 - Revert Files and Meta Data

Option 2 - Revert Files

) Enti	ies displayed on cover pages	Show						Move active file to	a different card 📝 Edit (	Card
/iew1	Recorded 4	User	Stage	Status	System Comments	Tools	State	Original Doc Link	Doc+CP Link	
•	2019-04-05 11:31:14	tunde@docboss.com	IFA	X+	Document stage was changed from Document Requirements page.		A	147568-0017.PRO_rA1.pdf	147568-0017.PRO rA1.pdf	
0	2019-04-05 11:24:08	tunde@docboss.com	IFI	X+	Updated from Code List(Requirements)	10 10	A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
9	2019-04-05 10:59:24	tunde@docboss.com	IFI	X+	Updated from card list	B B /	A	147568-0017.PRO_rA1.pdf	147568-0017.PRO rA1.pdf	
	2019-04-04 15:05:03	tunde@docboss.com	IFI	X+	Document was transmitted in T-007	B B /	A	147568-0017.PRO rA1.pdf	147568-0017.PRO rA1.pdf	
	2019-03-29 17:19:48	tunde@docboss.com	IFI	X(+)		D 2 /	A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
)	2019-03-29 12:24:59	tunde@docboss.com	IFI	X(+)		<u>ि के</u>	A	Setup Guide 2019-01-29.pdf	Setup Guide 2019-01-29.pdf	
)	2019-03-22 12:30:57	tunde@docboss.com	IFI	NULL	Document stage was changed from Document Requirement	0	Revert file			
)	2019-03-19 21:32:32	tunde@docboss.com	IFI	NULL	Revert file and meta-data	0	Kevertille			
)	2019-03-19 21:14:23	tunde@docboss.com	IFI	NULL	Updated from card list	Ø.	A			

