Routing Scenario

02/18/2026 4:23 pm MST

The routing scenario feature allows users to predefine document workflow in detail.

For example, in the image below, DocBoss knows to assign a specific set of reviewers based on the file's return source (customer) and whether or not the stage is complete.

These defaults can be changed when assigning documents if needed, but having the defaults applied saves time if the same set of reviewers need to look at a document each time a specific situation occurs.

Routing scenarios can be configured based on who the document is being returned from (sub-supplier, internal, customer), for internal approval, for NULL cards, and even per stage. They can also be assigned to individual doc codes or cards.

To get started, first create routing scenarios, then apply them to doc codes or cards.