Apply Custom Workflows

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Move through issue purposes automatically with stages

Easily build, reuse, and apply workflows—whether you're just sending files or managing complex approvals with suppliers, customers, and third parties.

What are stages in DocBoss?

> ℹ️ **Stages** are full workflow cycles that a document goes through in a single issue purpose (IFA, IFI, etc.). One or more stages can be included in a **stage list**, which represents the full lifecycle of a document (IFA-IFC-IAB, IFR-IFF, etc.)

Start using stages

This video reviews stages and stage lists conceptually, walking through two example workflows and their expected outcomes:

Document lifecycle, simplified

Does each stage in your workflow require different outcomes (e.g., different targets, whether or not to expect a return, etc.)? DocBoss makes it easy to automate even the most complex workflows.

Different targets

Each stage is independent - one stage can be targeted to your customer, while the next is targeted to your sub-supplier. Customize each stage to meet your requirements.

Expected outcomes

Will the document be returned by your customer? Is a new version of the document required? Each stage can be configured to align with expected outcomes.

Respond to changes

Workflow taking a different path than originally anticipated? Adjust the current workflow, or switch to a new stage workflow if needed.

How to create a stage list

Set up your stage list workflow in a few simple steps:

Step 1: Open the stage list page and click the "+ Add" button
Step 2: In the new stage list, add a new stage and configure the settings as needed
Step 3: Add additional stages (if needed) and save

Customize your workflows

Different kinds of documents require unique workflows. Learn about some of the available customization options below:

Schedule recurring submittals

Need to submit a monthly progress report to your customer? We can do that!

Manage multiple workflows

Need to send and keep track of your document to two different places? Manage these workflows simultaneously with temporary cards.

Reset revision numbers

Moving to a new stage can continue the revision numbering from the previous stage, or prompt a reset. Different values can also be set for different stages (e.g., A1 → B1).

Stage-specific due dates

Due date targets can be set per-stage, and can refer to different actions that take place. For example, if the document is due 7 days before the shipment date, we can accommodate for that.

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.