Bulk Assign and its impact on default routing

Some of the default routing which can be applied by DocBoss is applied in the background (when card changes stage). Some of it is applied only on the assign interface. Here is a description of the impact of bulk assign on default routing options:

Doc Code Routing (for NULL status)

This is applied only when cards are in NULL status. So, if you choose to complete current stage on the bulk process form, AND the next stage is set to "Require new doc", then YES - the system will apply doc code routing

More detail about Doc Code Routing

Do Not Transmit - Route To Role 4

If you have enabled Route to Construction in your stage, YES the system will assign this after processing your cards in bulk assign.

More detail about Route to Construction

Internal Approval Routing

If you bulk assign the documents and the internal approval routing is schedule for the CURRENT stage of the card, the NO. DocBoss will NOT assign this routing.

If you are completing one stage, and the NEXT stage has internal routing, then YES, the card will get routing if processed via bulk assign.

More detail about Internal Approval Routing.

Routing based on Stage Completeness

If you use the stage options
- Review before completing stage or
- Review when stage is not completed

then NO - the assignments will not be automatically applied

More detail for routing of cards based on stage completeness (complete/incomplete)

Manual routing

If you manually set routings during the bulk processing, then yes - they will be respected.