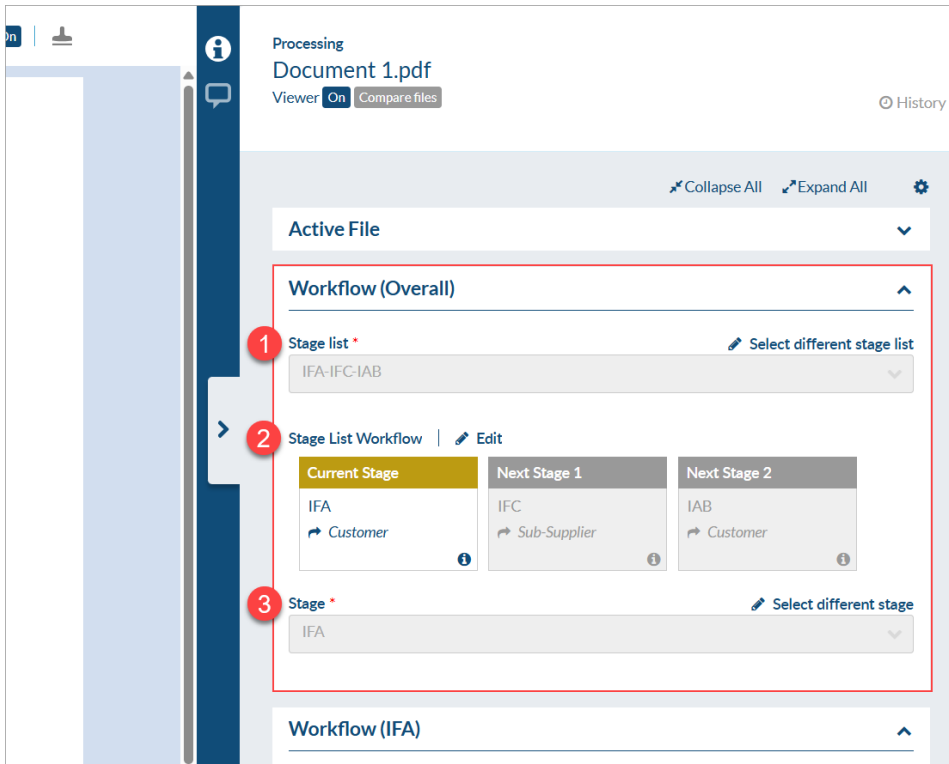


Modify Stages from Edit/Assign Screen

05/11/2026 2:54 pm MDT

When bringing in/returning a document, the stages of the selected stage list will appear in "Workflow (Overall)" section of the processing form.



The information provided is as follows:

1. The stage list that is set for the card.
2. The stage list workflow, informing you of the current stage the document is in, and the next stage that will be entered once the current stage is completed (if applicable).
3. The stage that the card is currently in.

Note: The workflow that is expected to occur after the file is processed (e.g., queue to target, stage change, etc.) will be outlined in the "Workflow ([Stage])" section.

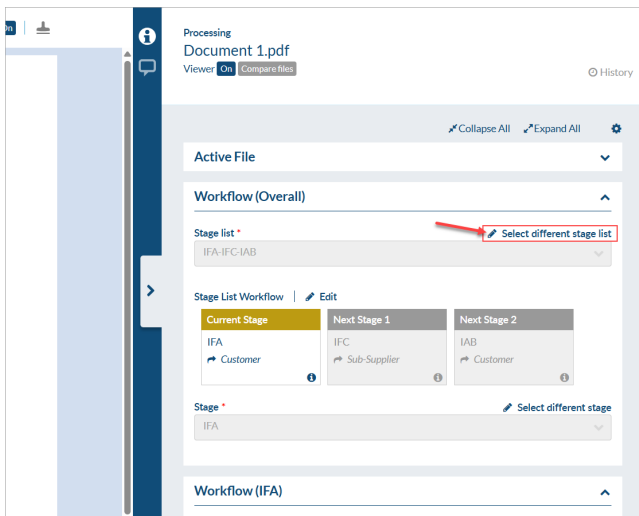
Change/edit stage list

On the processing form, you have the option to select a different stage list, or to edit the stage list workflow for this particular card.

Select different stage list

To select a different stage list, select the option (above the stage list section) and choose the appropriate list from

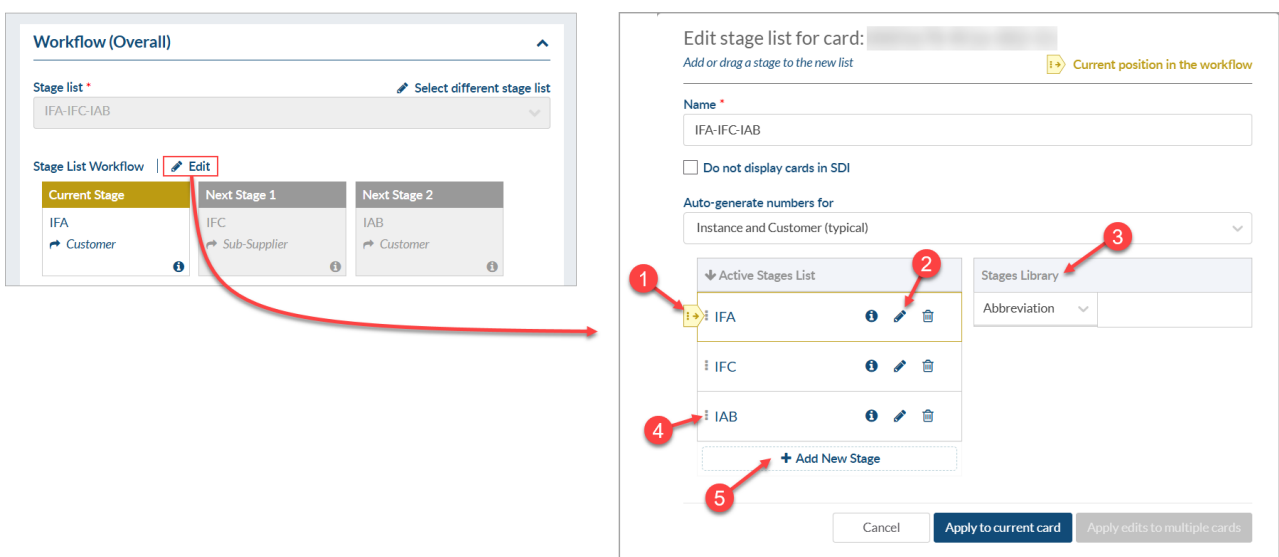
the available options. Once selected, the stage list workflow will be updated in accordance with the chosen stage list.



Edit stage list workflow

To edit the stage list workflow for the card, click the "Edit" button beside the stage workflow title. The available options are as follows:

1. Marker that identifies the current stage. If you want to change the stage, move the marker.
2. Option to edit the details of the stage.
3. Option to add a pre-created stage to the stage list work flow (from the stages library).
Note: The stage library (System Menu > Admin > Stage Lists > Library) is a list of pre-defined stages that can be added to stage lists (see support article: [Stages Library](#)).
4. Option to re-arrange the stages in the stage list (drag and drop).
5. Option to add a NEW stage to the workflow.





If updates are made, the stage list will be saved as a new stage list, requiring a unique name. After clicking apply (to current card or to multiple cards), the updated stage list (and associated stages) will show in the processing form.






Workflow (Overall) ^

Stage list *

 Select different stage list

IFA-IFC-IAB (Updated) 

Stage List Workflow |  Edit

Current Stage	Next Stage 1	Next Stage 2
IFA  Customer 	IFC  Sub-Supplier 	IAB  Customer 