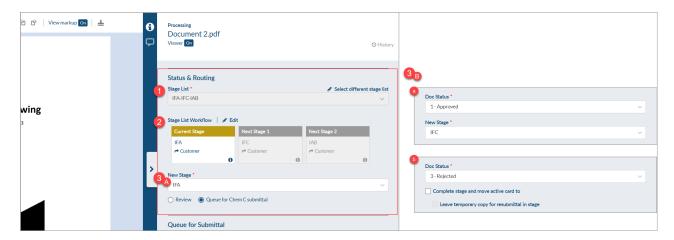
Modify Stages from Edit/Assign Screen

08/29/2025 9:32 am MD7

When bringing in/returning a document, the stages of the selected stage list will appear in "Status and Routing" 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 will be entered once the card is processed.
 - A. If the document is being brought in for the first time (e.g., from sub-supplier), the new stage will be the first stage in the stage list (e.g., IFA).
 - B. If the document is being returned (e.g., from customer), the new stage will depend on the status of the document.
 - a. If the document is given a completed status (e.g., approved, for information), the new stage will be the next stage in the stage list.
 - b. If the document is given an incomplete status, the document will remain in the current stage.

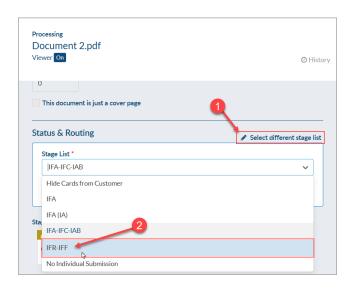
Change/edit stage list

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.

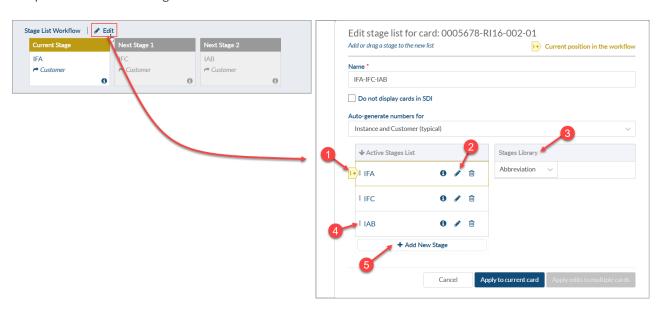


Edit stage list workflow

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.

