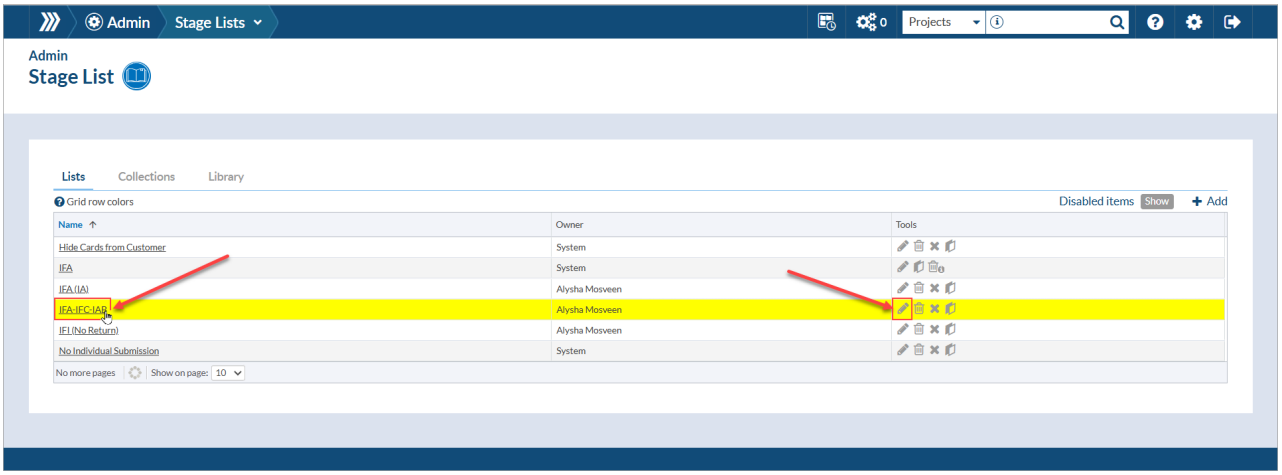
Add Stage(s) to Stage List

09/28/2026 8:11 am MDT

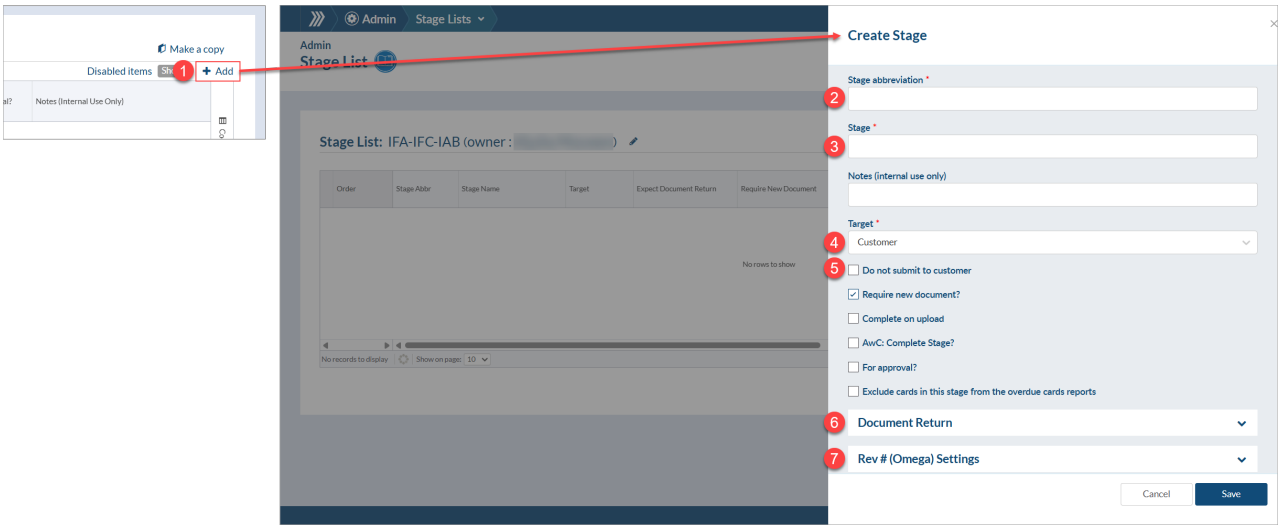
After creating a stage list, stages can be added to suit your company's process. If you are looking to modify stages on a stage list mid-project, see our support article: Update/Change Stage List Mid-Project.

To add a stage to a new stage list, click on the stage list name **or** the pencil icon under "Tools" of the stage list you are looking to modify.



Adding a stage

1. To add a new stage, click the "+ Add" button in the top of the grid.



2 + 3: Add the stage abbreviation and name, respectively.

4: Choose the appropriate target (customer, sub-supplier, or internal/third-party). The target is the destination of the document (i.e., where the completed document will be queued for submittal).

5: Modify the available options, as needed. The options available are:

a. **Do not submit to customer:** If checked, cards say in an incomplete status and will therefore be hidden from the Outgoing Submittals queue to customer. This option is intended to be used with "each" cards in packages,

where cards can be given a status individually after unpacking the returned package card.

b. **Require new document?:** If checked, the first status of the stage will be set to NULL and a new document will be expected (via incoming documents).

c. **Complete on upload:** If checked, the card status will be set to complete once a new document is brought in.

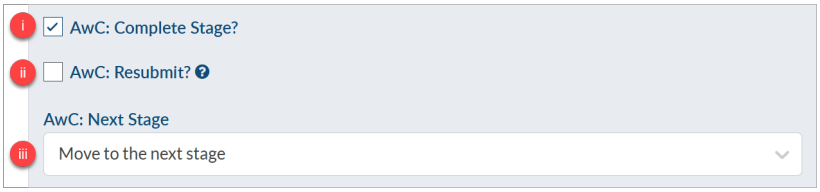
   a. *Note: This checkbox is only available if the "Require new document?" option is selected.*

d. **AwC: Complete Stage?**: If checked, documents returned with an "Approved with Comments'" status will be considered complete and the stage will complete, too. By default, the card will move to the next stage in the stage list, but a different stage can be chosen from the "AwC: Next Stage" drop-down (iii) if needed.

   a. *Note: For this option to function, the document must be given a return status that has the "Approved with Comments" checkbox enabled.*

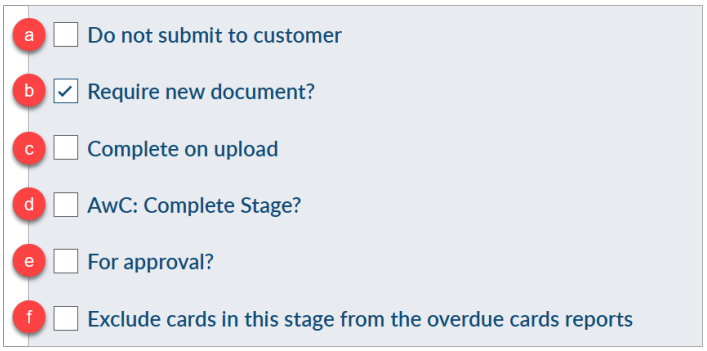


   b. In addition, the "AwC: Resubmit?" option (ii) can be used to require the resubmittal of documents returned with an "Approved with Comments" status. This option will result in a temporary card being created in order to manage the resubmittal in the original stage (and the active card will be moved to the next stage, as defined by the "AwC: Next Stage" column). Once the temporary card is approved by the stage target (e.g., customer), the temporary and active cards will be merged together.



e. **For approval?:** If checked, documents in the stage will be being sent for approval.

f. **Exclude cards in this stage from the overdue cards report:** If checked, cards in this stage will be excluded from the overdue cards report.



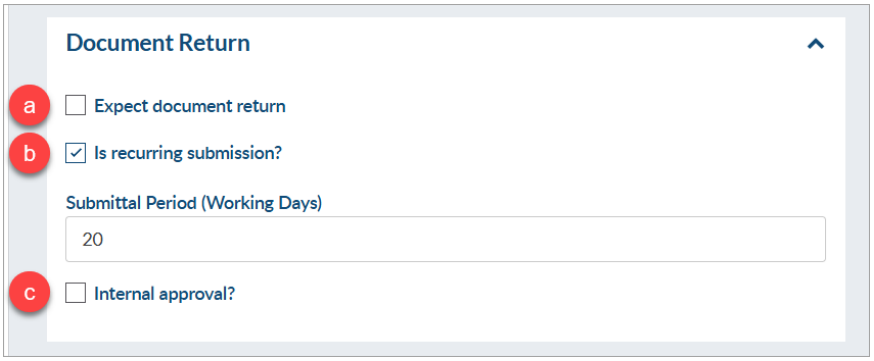
6: Modify the document return options, as needed. The options available are:

a. **Expect document return:** If checked, cards in this stage are expected to be returned. If left unchecked, the stage will auto-complete upon submittal to the target.

b. **Is recurring submission?:** If checked, the card will remain in the queue for submittal indefinitely (even after

being submitted). The new due date that is set after each submittal is determined by the defined submittal period (in working days).
Note: This checkbox is only available if the "Expect document return?" option is de-selected.

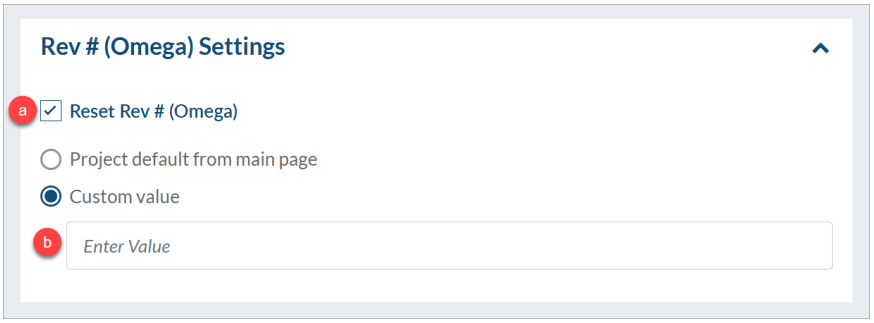
c. **Internal approval?:** If checked, the stage will move through the internal approval workflow. For more information about internal approval, see our support article: Introduction to Internal Approval.



7: Modify the revision number settings, as needed. The options available are:

a. **Reset Rev Number (*Company Name*):** If checked, the project default revision value can be reset to a custom value.

b. **Custom value** *(if selected)*: If a character is added, it can be appended as a suffix or prefix to the revision number.

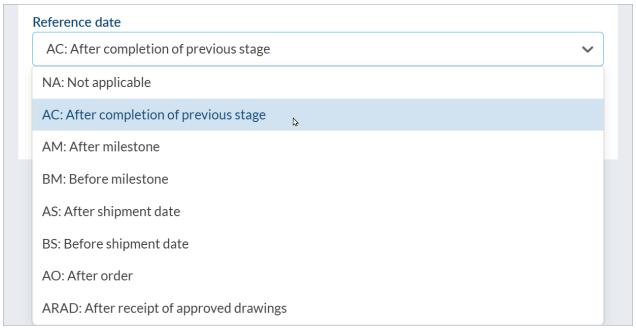


For more information, see our support article: Set Custom Revision Numbers (Per Stage).

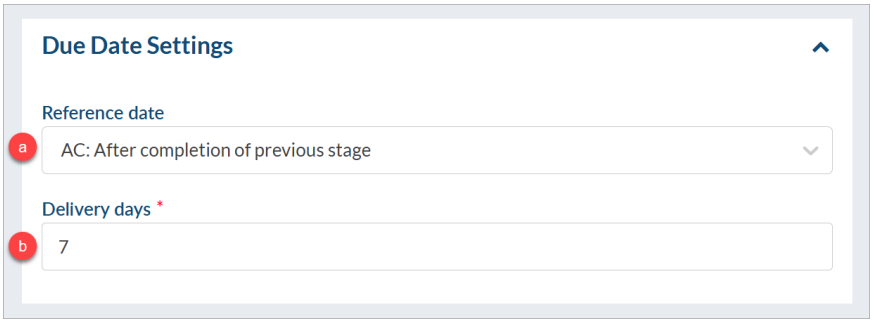
Due date settings

After one stage has been added, any subsequent stage(s) will have an additional customization option pertaining to the due date of cards in the stage. The options available are:

a. **Reference date:** The point at which the delivery day number begins. By default, the reference date is set to "AC: After Completion of Previous Stage," but can be changed if required.



b. **Delivery days:** Number of days before the document is due. For example, if the numerical value is "10," this means the due date will be set to 10 days after the reference (e.g., AC: After Completion of Previous Stage).

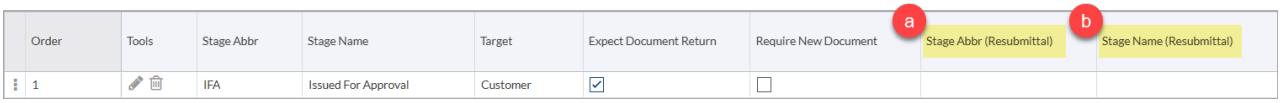


Resubmittal stage name and abbreviation

Once a stage is added in the stage list, there are two additional options available pertaining to resubmittal. The options available are:

a. **Stage Abbr (Resubmittal):** If added, this will be the stage abbreviation that appears upon resubmittal.

b. **Stage Name (Resubmittal):** If added, this will be the stage name that appears upon resubmittal.



Next steps:

1. Assign Stage List to Doc Code
2. Stage List Workflow (Example)