

Managing Break Apart Templates

SUMMARY

Break apart templates enable you to quickly apply a standard break apart configuration to a document. This can be helpful if you regularly scan a group of docs into Pipeline in the same order.

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Create a Break Apart Template

Break apart templates are created by checking the “Save this as a new template” checkbox when you are breaking an unassigned or transaction doc apart. To create a break apart template:

- 1 Follow the steps to break apart a doc.
- 2 Check [Save This as a New Template] to be able to reuse the configuration as a break apart template.

Start #	End #	New Document Name	Permission Category	Reviewed
1	2	Addendum 1	Listing	<input type="checkbox"/> <input checked="" type="checkbox"/>
2	4	Addendum 2	Office	<input type="checkbox"/> <input checked="" type="checkbox"/>
-	-	New Document Name	Office	<input type="checkbox"/> <input checked="" type="checkbox"/>
-	-	New Document Name	Office	<input type="checkbox"/> <input checked="" type="checkbox"/>

+ Add more ranges

Save this as a new template

Delete original doc after breaking apart

Break Apart Cancel

- 3 Click [Break Apart]. Pipeline will break apart your document into the segments you specified and save the break apart template for reuse.

[Learn More About How to Break Apart Docs →](#)

Once a break apart template has been created, it can be renamed or deleted on the [Break Apart Templates](#) page →

Use a Break Apart Template

To use a previously saved break apart template:

- 1 On the doc you'd like to break apart, click the [Gear] then select "Break Apart".
- 2 Select the template you saved in the past and click [Go].

Break Apart Notice to Prospective Buyer
Email docs and notes to this transaction: 2530-67829-TX-2597931@docs.paperlesspipeline.com


This doc has 1 page. Select a range of pages you would like to break apart and give each range a name. Or, select a template below.

-- Select a Template -- Go

	Permission Category	Reviewed
Uptown Office		
Erika's Break Apart Template_test - (Monta Fleming - 1/25/18)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>
Justin's templatett - (Monta Fleming - 1/25/18)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>
Broadway and 11th office		
res pur con BA - (Hollis Holcomb - 4/16/18)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>
North Park office		
Abi's break apart template - (Monta Fleming - 12/9/14)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>
Anthony's Break Apart Template - (Monta Fleming - 12/15/14)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>
August Test - (Monta Fleming - 8/19/14)	Sale	<input type="checkbox"/> <input checked="" type="checkbox"/>

Break Apart Cancel

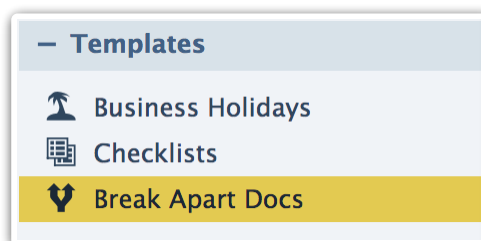
- 3 The template will be populated with the saved specifications. You can further customize the specifications to fit this particular break apart like adjusting the page numbers, setting permission categories, or reviewing the docs.
- 4 Click [Break Apart].

 [Learn More About How to Break Apart Docs →](#)

Delete a Break Apart Template

To delete unwanted templates:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Click **Break Apart Docs** from the **Templates** menu on the left.



- 3 Click the [Gear] next to the desired break apart template then select "Delete".

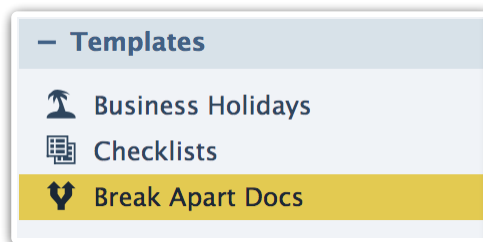
Sean's Break Apart Template	North Park office	Monta F.	May 7, 15	
John's Break Apart Template	North Park office	Monta F.	Apr 23, 15	
Erika's Break Apart Template_test	Uptown Office	Monta F.	Apr	Edit Template
Tammy's Break Apart Template	North Park office	Monta F.	Apr	Delete

Only admins have the ability to delete break apart templates.

Rename a Break Apart Template

To rename an existing templates:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Click **Break Apart Docs** from the **Templates** menu on the left.



- 3 Click the [Gear] next to the desired break apart template and select **Edit Template**.

Sean's Break Apart Template	North Park office	Monta F.	May 7, 15	
John's Break Apart Template	North Park office	Monta F.	Apr 23, 15	
Erika's Break Apart Template_test	Uptown Office	Monta F.	Apr	Edit Template
Tammy's Break Apart Template	North Park office	Monta F.	Apr	Delete

- 4 Update the name of the break apart template and click [Save].

Template	Location	Added By	Added On	
res pur con BA	Broadway and 11t...	Hollis H.	Apr 16, 18	
Ramu's Break Apart Template	North Park office	Monta F.	Aug 13, 15	

Only admins have the ability to rename break apart templates.