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.
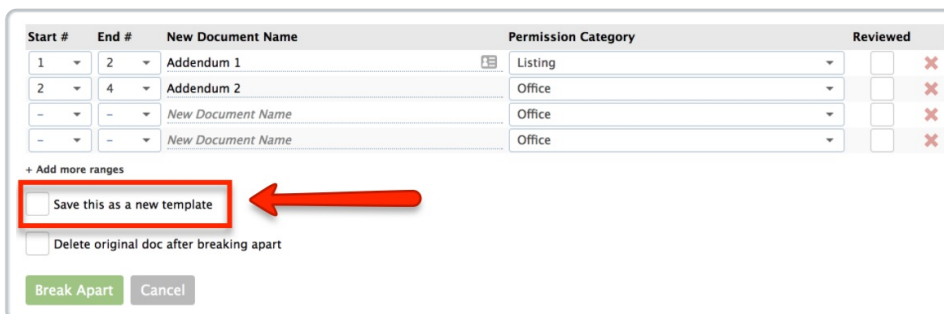
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Create a Break Apart Template

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 ▾	☐	✖
2 ▾	4 ▾	Addendum 2		Office ▾	☐	✖
– ▾	– ▾	New Document Name		Office ▾	☐	✖
– ▾	– ▾	New Document Name		Office ▾	☐	✖

+ 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].**

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.
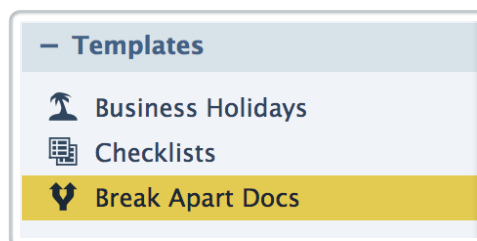
4 **Click [Break Apart].**

Learn More About How to Break Apart Docs →

Delete a Break Apart Template

To delete unwanted templates:

① **Click 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*".**
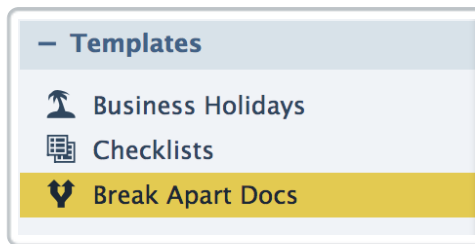

⚠️ Only admins have the ability to delete break apart templates.

Rename a Break Apart Template

To rename an existing templates:

① **Click 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
Justin's templatett	Uptown Office	Monta F.	Mar

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

Break Apart Templates

Template	Location	Added By	Added On	⚙
res pur con BA	Broadway and 11t...	Hollis H.	Apr 16, 18	⚙
Ramu's Break Apart Template save cancel	North Park office	Monta F.	Aug 13, 15	⚙
Test Aug 13 2015	North Park office	Monta F.	Aug 13, 15	

⚠ Only admins have the ability to rename break apart templates.