

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

- 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

Uptown Office

- Erika's Break Apart Template_test - (Monta Fleming - 1/25/18)
- Justin's templatett - (Monta Fleming - 1/25/18)

Broadway and 11th office

- res pur con BA - (Hollis Holcomb - 4/16/18)

North Park office

- Abi's break apart template - (Monta Fleming - 12/9/14)
- Anthony's Break Apart Template - (Monta Fleming - 12/15/14)
- August Test - (Monta Fleming - 8/19/14)

Permission Category	Reviewed
Sale	☐
Sale	☐
Sale	☐
Sale	☐

Break Apart Cancel

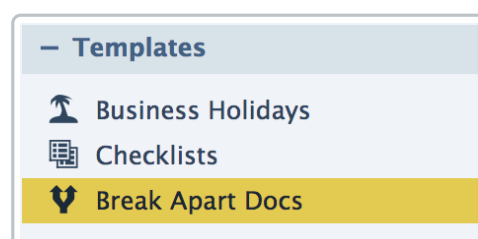
- 3 The template will be populated with the saved specifications. You can further customize the specifications to fit this particular break apart like adjusting the page numbers, setting permission categories, or reviewing the docs.
- 4 Click [Break Apart].

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

Delete a Break Apart Template

To delete unwanted templates:

- 1 Go to Admin / Settings
 - 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".

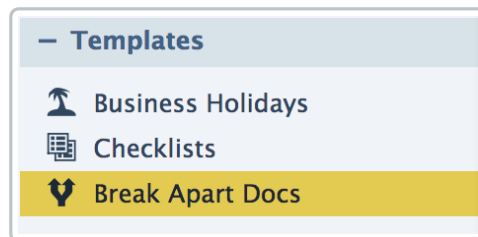
Sean's Break Apart Template	North Park office	Monta F.	May 7, 15	⚙️
John's Break Apart Template	North Park office	Monta F.	Apr 23, 15	⚙️
Erika's Break Apart Template_test	Uptown Office	Monta F.	Apr	✏️ Edit Template
Tammy's Break Apart Template	North Park office	Monta F.	Apr	✖ Delete

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
 - 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

- 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	⚙️
Ramou's Break Apart Template	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.