

Break Apart Templates FAQ

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A break apart template stores the page ranges and doc names from a break apart you've already done, ready to reuse on the next packet. Answers to the common questions about who can see them, editing them, and when they actually save time.

What's the difference between breaking a doc apart and a break apart template?

One is the action; the other is a saved configuration for it. Breaking a doc apart splits a PDF into separate named documents, and you can do that any time without ever touching a template. A template just remembers the page ranges and names from a split you did before, so the next identical packet fills itself in.

Who can see the templates I save?

Everyone in your office. Templates are shared at the office level by design, so any template is available to anyone breaking a doc apart. There's no way to keep one private to yourself.

Can I edit a template's page ranges?

No — a template's contents are fixed. Admins can rename or delete it. To change the configuration, delete the template and save a new one the next time you break that packet apart.

Can an admin create templates for the whole office?

Not centrally — templates are only made during a break apart. Admins can rename and delete the ones that exist. If what you actually want is consistent document naming across the office, that's a different tool.

Do templates help if every packet is different?

Not really. Templates pay off when the same documents arrive in the same order with the same page counts. When each file is different, you'll be adjusting the page ranges anyway, and the manual work is the same.

Why can't I break a doc apart or see my templates?

Agents can only break apart docs they uploaded themselves, and only before an admin takes the doc over. Once a doc has been assigned or reviewed by an admin, the break-apart option goes with it. Ask an admin to make the split.

Where do I manage the templates we've saved?

Under [Break Apart Docs] in your admin settings. Click the [Gear] in the upper-right corner, go to [Admin / Settings], and choose [Break Apart Docs] from the Templates section of the left menu. Admins can rename and delete from there.

Standardize Doc Names Instead

Templates fix how a packet is split. If what you want is every agent naming the same form the same way, that's a different tool.

Build a shared list of your company's document names, and every agent names the same form the same way — with your preferred label and permission category already attached.

See [Standardized Document Names](#)

Learn More

Save a break-apart configuration once, then reuse it every time the same packet arrives in the same order.

See [Break Apart Templates](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
