

Break Apart Templates

Last Modified on 09/04/2026 11:07 am EDT

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

Introduction

Some packets always arrive the same way. The same forms, in the same order, with the same page counts, week after week. Splitting that by hand every time is the kind of work a computer should be doing.

A break apart template records the page ranges and doc names from a split you've already done. The next time the same packet shows up, pick the template and the configuration fills itself in.

Templates are made while you're breaking a doc apart, not from a settings page — you save the work you just did so you can reuse it.

How It Works

Save the configuration once during a break apart, then pick it from a list the next time.

Where a Template Comes From

You create a template by checking a box while you break a doc apart. There's no way to build one from scratch in the admin settings — the split you're doing right now is the template.

Templates Are Shared

Templates belong to the office, not to the person who saved them. Everyone can see and use every template, and there's no setting to keep one private.

Editing Means Replacing

A template's contents are fixed once saved. Admins can rename or delete a template, but changing the page ranges means deleting it and saving a new one from your next break apart.

Where They're Managed

Saved templates are listed under **Break Apart Docs** in the Templates section of your admin settings, where admins can rename and delete them.

When They Actually Help

Templates save time only when your documents arrive in a consistent order. If every packet is different, you'll adjust the page ranges anyway and the template hasn't saved you the work.

Save a Break Apart Template

Keep the configuration from the split you're doing right now, so you can reuse it later.

Who Can Do This: Anyone who can break apart the doc they're working on.

To save a break apart template:

1. Break apart the doc as you normally would, setting your page ranges and doc names.
2. Check [Save This as a New Template].
3. Click [Break Apart].

Pipeline splits the document into the segments you specified and saves the configuration for next time.

Use a Break Apart Template

Load a saved configuration onto the packet in front of you, then adjust anything that's different this time.

Who Can Do This: Anyone who can break apart the doc they're working on.

To use a break apart template:

1. On the doc you want to break apart, click the [Gear], then [Break Apart].
2. Select the template you saved, then click [Go].
3. Review what the template filled in, and adjust anything this packet needs — page numbers, permission categories, whether to mark the docs reviewed.
4. Click [Break Apart].

The doc splits along the template's configuration, with whatever changes you made for this one.

Rename a Break Apart Template

Give a saved template a name your whole office will recognize.

Who Can Do This: Admins.

To rename a break apart template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the Templates section of the left menu, click [Break Apart Docs].
3. Click the [Gear] next to the template, then [Edit Template].
4. Update the name and click [Save].

The new name shows for everyone the next time they open the template list.

Delete a Break Apart Template

Clear out a template nobody uses — or one you're replacing with a new configuration.

Who Can Do This: Admins.

To delete a break apart template:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the Templates section of the left menu, click [Break Apart Docs].
3. Click the [Gear] next to the template, then [Delete].

The template comes off the list for everyone. Documents you split with it before are untouched.

Break Apart Templates FAQ

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. See [Break Apart Templates FAQ](#).

