Split a Scanned Packet Into Separate Documents

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Scan the whole stack in one pass and split it afterwards. It's faster than scanning each document separately, and your checklist still gets the individual files it expects.

Introduction

A new listing arrives as a pile of signed paper — agreement, disclosures, lead paint, agency, a dozen forms. Your checklist wants them as separate documents with separate names. The instinct is to scan them one at a time, feeding the machine twelve times and naming twelve files.

Don't. Scan the whole stack in a single pass, get that one big PDF into Pipeline, and cut it up inside the system. You spend the time at a screen instead of at the copier, and the naming happens once, in the place where the standard names are already suggested to you.

When to Use This

- A listing or closing packet came in as one long scanned PDF and your checklist expects individual documents.
- You're standing at the copier scanning documents one at a time.
- An agent emailed in a combined file and it needs to be split before it's useful.
- Breaking a document apart throws an error and you don't know why.

1. Scan the Stack in One Pass

Load the whole pile, scan once, and let it come out as a single PDF. Keep the documents in a sensible order while you're at it — the order they're in is the order you'll be cutting, and a packet scanned in checklist order is noticeably quicker to split.

2. Get It Into Pipeline

Upload the combined file onto the transaction, or send it to a maildrop address and file it from the queue. Either route ends the same way, with one long document sitting on the transaction waiting to be cut.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs

3. Cut It Into Named Documents

Open the document's break-apart view and work down the pages: click the scissors between two pages to cut there, **[X]** out any section you don't want to keep, and give each remaining section its name. Save once at the end

and the packet becomes a set of properly named documents on the transaction.

One scanned stack, many documents. Break a doc apart to split it into separate docs, pull out the pages you need, and name each one as you go.

See Doc Break Apart

> Agents can break apart the documents they uploaded themselves, but only until an admin assigns or reviews them. Once a doc is reviewed it's locked, and splitting it becomes an admin job.

4. Fix a Packet That Refuses to Split

When breaking apart fails, the document is almost always the problem rather than Pipeline — old scanning software producing a legacy-format PDF, or a file with security settings on it. The fix is to give the system a clean copy: open the PDF, print it to a new PDF, and upload that.

If it's one agent's documents failing over and over, the durable fix is their scanning software rather than your patience. Modern scanning software produces clean PDFs and the errors stop.