

Adding Plans to a Batch

10/07/2025 1:40 pm CDT

To add plans to your batch, click on the "Add Plans" button near the top of the menu. The software will open a window displaying a list of all plans on your account that are on the checklist type you chose.

Home > Batch DocPrint > DocPrint Test Batch

Batch:	DocPrint	Count:	0	Error:	▲
Batch Name:	DocPrint Test B...	Complete:	<input type="checkbox"/>	Print:	<input type="checkbox"/>
Batch ID:	346130	Publish:	<input type="checkbox"/>	Status:	
Checklist:	4KPT:VolSub:POST				

Add Plans

Company Name	EIN	Company ID	Plan Name
Company Name	EIN	Company ID	Plan Name

No records available

Filters at the top of the window may be utilized to narrow the list of plans. You can choose to select plans individually or by checking the select all box. Once you have selected your desired plans, click on the "Add" button.

PLEASE NOTE: For efficiency, we recommend limiting the number of plans in your batch to 300 or less.

Add Plans

Company Name	Plan Name	PlanID	PlanNumber
Sample Company	Sample Company 401(k) Plan		001

Add Cancel

Current View Total: 1 / Number Selected: 0
Results are filtered

[Export current view to CSV](#)