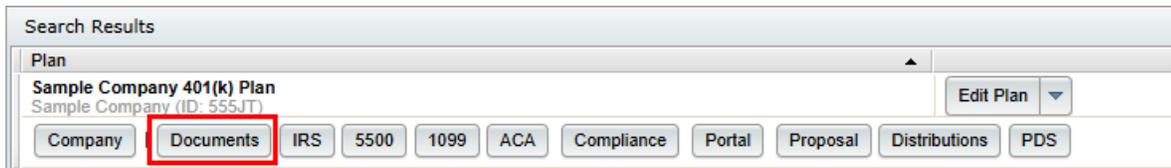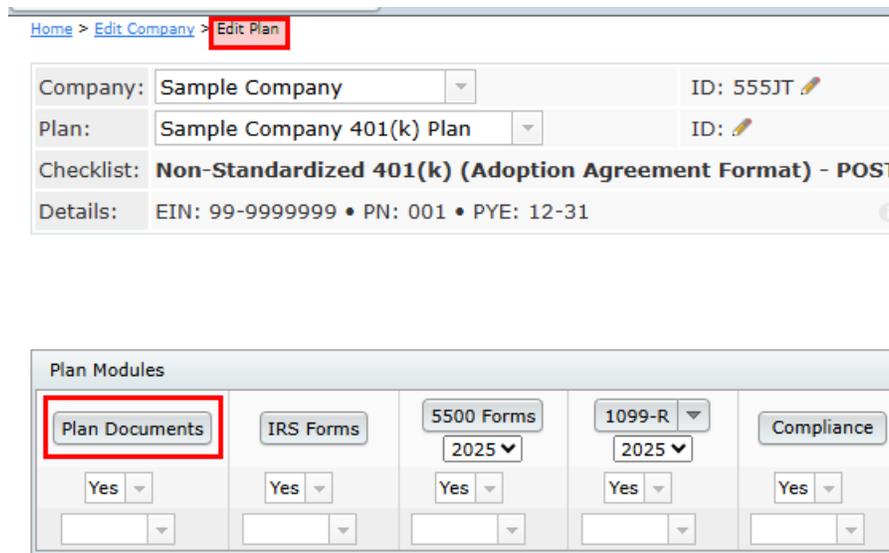# How to Print Plan Documents

03/09/2026 11:51 am CDT

When you are ready to generate your plan documents from the software, follow the steps below to select, manage, and print your documents efficiently.

Accessing the Print Plan Documents Page: You can access the print Plan Documents page in two ways:

- From the Home page, click on the "Documents" button located under the desired Plan Name to go directly to the print Plan Documents page.


- From the Edit Plan page of a Plan, click on the "Plan Documents" button to access the print Plan Document page.

Using the Plan Documents Menu: Under the Plan Documents Menu, you have several options to customize and manage your documents before printing.

- Choose Document Format: Select between Word or PDF format for your documents.
- Edit Filenames: Modify document filenames as needed to apply to the specific plan.
- Override Global Filename: If you have customized Global Filenames, you can override them by checking the box next to "Override Global Filename".
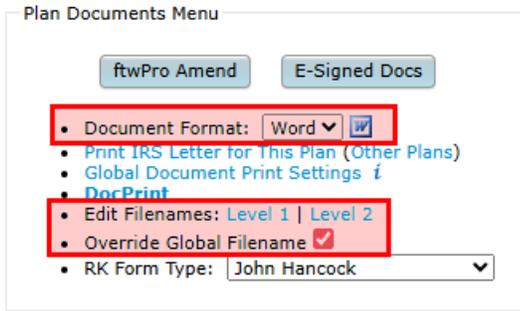
To Print a Single Document: Click directly on the document name, which acts as a link to print just that document.


To Print Multiple Documents: Check the box next to each document you want to generate. You can select as many documents as desired for batch printing and publishing to the Portal.
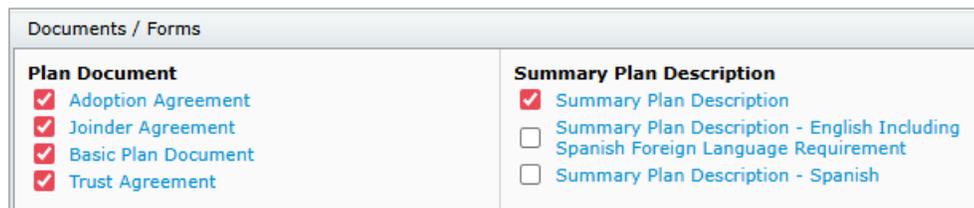
After selecting your documents, click on "Do with selected" at the bottom of the page where you can choose to:
- "Print to One File" - generates one file for all documents selected.
- "Download in a Zip" - generates a Zip file for all documents selected.
- "Publish to Portal" - available to customers who subscribe to our Portal package.
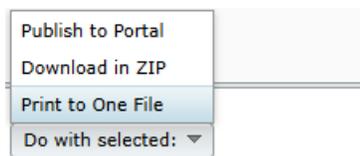
NOTE: Please refer to "Sending Documents Through the Portal" in the Portal User Guide for publishing to the Portal.

Setting Edit Filenames on the Plan Level: To set Level 1, click on the "Level 1" link. Level 1 applies to the folder that is downloaded from the software. This will contain a plan folder and all the files for documents you select.

NOTE: If you have established Global Filenames, be sure to check the box next to "Override Global Filename" prior to setting Level 1 and Level 2 at the Plan level.

- **Start with Defaults:** When you begin, the default filename structure will be enabled automatically. This provides a base format for your filenames.
- **Add Elements:** To customize the filename structure, click on the "Add Element" link. A drop-down menu will appear. From the drop-down, select any of the available options you want to include in your filename (e.g., Plan Name, etc.). You can add additional elements by clicking on the "Add Element" link.

- **Insert a Separator:** You can add a separator between elements for better readability. To add a space between your elements, choose "(Separator)" from the drop-down list.
- **Sort the Order:** To arrange the order of the elements, use the up and down arrows next to each element. Click the arrow to move the element higher or lower in the filename sequence.
- **Remove an Element:** If you decide you do not want a particular option, click the trash can icon next to that element to remove it from your filename structure.
- **Preview the Filename:** Under the "Value" column, you will see a live example of how the filename will appear

based on your current selections and the order you have set. In addition, you can view an example of the new filename.

- **Save Your Settings:** Once you are satisfied with the filename structure, make sure to save your changes to apply the customized Level 1 filename format by clicking on the "Ok" button.
- **Reset to Default:** You can reset back to the default filename structure by clicking on the "Reset to Default" link.

Setting Level 2: To set Level 2, click on the "Level "2" link. Follow the same steps above to customize the filename structure. Level 2 applies to the file name. This will be used when selecting to print a single document.