

Creating a Batch

10/02/2025 4:49 pm CDT

1. To create a batch, click on the "Create New Batch" button.

Home > Batch DocPrint

Batch: DocPrint NOTE: For efficiency, keep batches below 300 plans.

Create New Batch | [Work Flow](#)

Batch Name	Batch ID	Count	Error	Complete	Print	Publish	Status
No records available							

2. Type in a name for the batch, select the checklist from the drop down menu of your desired plan type and click on "Ok". You will be directed to the batch menu where you can add plans to your batch.

New Batch

Enter batch name: DocPrint Test Batch

Select Checklist: Non-Standardized 401(k) ▼

→

OK

In addition, you can select an existing batch. To select an existing batch, click on the batch name.

Batch Name	Batch ID	Count
DocPrint Test Batch	346130	1