

# Adding New Companies and Plans

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To add new companies or plans to your account, the file upload must include identifying information for each entity as column headers.

## Required Fields

- **CompanyName:** This column header is mandatory for every new company or plan.

## Adding a Plan

- **ftwCustomerID, CustomerID, or CompanyEmployerID (EIN):** One of these must be included as a column header to link the plan to its sponsor.
  - **PlanLine1:** A column header indicating the plan name.
  - **Checklist and PlanType:** Column headers for these values must be included, and the combination must match the options listed on the downloaded document schema.
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