

Updating Existing Companies and Plans

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Updating Company Information

To update information for an existing company on your account, the file upload include at least one of the following identifiers for each entity as a column header:

- CustomerID: This is a unique value you assign to each employer.
- CompanyEmployerID: Employer's EIN.
- ftwCustomerID: This unique ID is generated by the ftw system. You can find these IDs by clicking Download ftwilliam.com plan IDs from the Download Document Schemas link.

Sample Schema Files

[Download Document Schemas](#)

Updating Plan Information

To begin updating plan information for existing plans on your account, the first step is to download the report named Document Provisions by Checklist. This report provides a comprehensive CSV file containing the current plan provisions, which you can edit as needed before uploading the updated information back into the software.

For detailed instructions on how to generate and use this report, please refer to the [Reports](#) section in the Document User Guide.

To update an existing plan, you must provide at least one of the following identifiers as a column header for each plan to ensure the system recognizes the plan you wish to modify:

- PlanID: A unique value you assign to each plan.
- PlanNumber: The plan's number and one of the company identifiers above for the associated company.
- FTWPlanID: This unique ID is generated by the ftw system. You can find these IDs by clicking Download ftwilliam.com plan IDs from the Download Document Schemas link.

Sample Schema Files

[Download Document Schemas](#)

Important Notes About Uploading Data

It is recommended to retain the Plan Name (PlanLine1 column header) for easy reference even though this information is not required for the upload.

If you upload a .csv file containing blank entries for certain fields, those values will be deleted for the corresponding row – unless the row includes identifying information for the plan as described above, or the field only accepts List Values.

To ensure accuracy, review the Download Document Schemas for details on which fields use list values and what those list values are.
