

Updating Existing Companies and Plans

08/16/2024 4:38 pm CDT

To update existing company data, you must include at least one of the following fields that match a Company you administer on the ftw system:

- CustomerID—a unique value you may assign to each employer from the
- Employer's EIN
- ftwCustomerID (a unique identifier created by the system – you can get find the IDs by clicking **Download ftwilliam.com plan IDs** from the Upload Company and Plan Information screen)

To update existing plan data, you must include at least one of the following fields for each plan to identify an existing plan on the system:

- PlanID—a unique value you may assign to each employer
- PlanNumber and one of the company identifiers above for the relevant Company
- FTWPlanID (also included for each plan when you click **Download ftwilliam.com plan IDs**)

Uploading a .csv file with blank entries will delete the value for that row, unless it includes identifying information for the plan as mentioned above, or only accepts List Values. See the corresponding schema download to see which fields use list values and what those list values are.
