

Uploading a File and Understanding Upload Results

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Uploading a File

To upload a file, choose the file from your computer and click the "Submit" button. The system will provide an immediate preview window of the proposed changes before the upload is performed. This preview enables you to review total updates, additions, any errors and warnings, ensuring accuracy and preventing unwanted changes.

The screenshot shows the file upload process. At the top, there is a form with the following elements:

- Upload file name: Choose File No file chosen
- Number of rows before column headers: 0
- Submit button (highlighted with a red box)
- Cancel button (blue text)

Below the form is a window titled "Company/Plan Upload" with a close button (x). The window contains an "Upload Results Preview" section with a table of results:

#	Result	Company	Plan	CustomerID	CompanyEmployerID	FTWCustomerID	CompanyName	PlanID	PlanNumber	FTWPlanID	PlanLine1
1	OK		Add			2219449873				2839521124	Test
2	OK		Add			2219450572				2839522672	Test

Below the table, there are summary statistics:

- Total rows processed/received: 2/2
- Total rows with companies to be added: 0
- Total rows with companies to be updated: 0
- Total rows with plans to be added: 2
- Total rows with plans to be updated: 0
- Total errors: 0
- Total warnings: 0
- Headers not recognized: (empty box)

At the bottom right of the window, there are two buttons: "Perform Upload" (highlighted with a red box) and "Cancel".

Reviewing the Upload Results Preview

The preview window will provide the changes that will be made to each plan and company listed in your upload file. The preview table always includes the following column headings:

- PlanID
- CustomerID
- ftwCustomerID
- CompanyEmployerID (EIN)

If any of these values are updated in your file, the new value will appear in the corresponding column. If the column is blank, it means no change is being made to that field.

Under the "Results" column, you preview any errors or warnings ahead of performing the upload. To view, just click on the link.

Company/Plan Upload

Upload Results Preview


#	Result	Company	Plan	CustomerID	CompanyEmployerID	FTWCustomerID	CompanyName	PlanID	PlanNumber	FTWPlanID	PlanLine1
1	Error										
2	OK		Add			2219449873				2839532351	Test
3	OK		Add			2219450572				2839533333	Test

[Download as CSV](#)

Total rows processed/received:	2/3	Total errors:	0
Total rows with companies to be added:	0	Total warnings:	0
Total rows with companies to be updated:	0		
Total rows with plans to be added:	2		
Total rows with plans to be updated:	0		

Headers not recognized:

Row Errors



This row has the following error(s):

Row skipped - Missing Checklist and/or PlanType for new plan record.

Performing the Upload

If all of the information in the Upload Results Preview is accurate, click on the "Perform Upload" button to complete the upload.

Errors and Warnings

After an upload, you may encounter errors or warnings. These notifications help ensure data integrity:

- **Warnings:** If a warning occurs, the specified value will be excluded from the upload for the stated reason, but any other valid data will continue to be processed. For example, you may receive a warning if an entry does not match the required schema responses. In a company upload, setting 'EntityType' to 'Union' would trigger a warning since 'Union' is not an allowed value.
- **Errors:** If there is insufficient identifying information to update or add a record, an error will occur and the entire row or entry in your .csv file will be skipped.

Restricted Operations via File Upload

To prevent entry errors, certain changes cannot be made through file uploads. These forbidden operations include:

- Changing the Plan Sponsor of an existing plan
- Changing the Plan Type or Checklist Type

