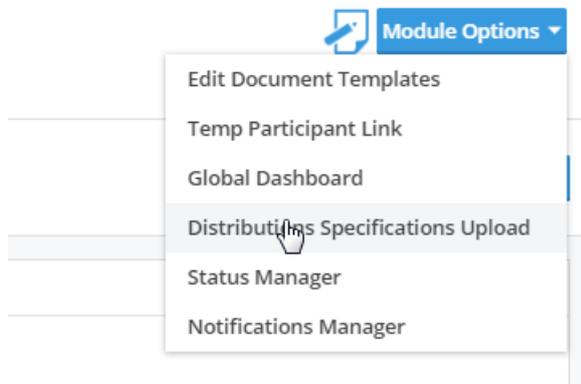


# Batch Upload Distribution Specifications

12/04/2024 4:10 pm CST

As an alternative to the default specifications, users may also upload specs. This is especially helpful if many of your plans will vary. For example, provider name, portal access and rollover provider may vary by plan.

Step 1: Locate the “Module Options” button in the upper right corner of your DTS dashboard. Once located, select “Distributions Specifications Upload”.



Step 2: In the “Global Distributions Specifications Upload” window, locate the link called “Download Distributions Specifications Records” and download this spreadsheet. This spreadsheet includes all of the company and plan details needed for the upload for each of the plans that already exist in your account. This is a great starting point. Save this file to your computer as a .CSV file for later use.

## DISTRIBUTIONS

### Global Distributions Specifications Upload

To update plan distribution specifications, you must include one of the following ID combinations

- CompanyEmployerID(EIN) (customer-assigned value)/PlanNumber
- CompanyEmployerID(EIN) (customer-assigned value)/FTWPlanID (can be found via "Download ftwilliam.com plan IDs")
- FTWCustomerID (can be found via "Download ftwilliam.com plan IDs")/FTWPlanID
- FTWCustomerID (can be found via "Download ftwilliam.com plan IDs")/PlanNumber
- CustomerID/FTWPlanID (can be found via "Download ftwilliam.com plan IDs")
- CustomerID/PlanNumber
- PlanID (customer-assigned value)

The download for the Distribution Specifications Records can also serve as a template for uploading/overriding specifications

Specifications Schema is a list of acceptable fields to upload to the specifications

**Upload File** [No file selected]

Number of lines to skip:

[Download Distribution Specifications Records](#)

[Download DTS Specifications Schema](#)

**Cancel** **Upload**

Step 3: Now locate the second link called "Download DTS Specifications Schema". The DTS Specifications Schema is a list of acceptable fields to upload to the specifications. Without these fields, the software will not know where to map your answers.

## DISTRIBUTIONS

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**Upload File** [No file selected]

Number of lines to skip:

[Download Distribution Specifications Records](#)

[Download DTS Specifications Schema](#)

**Cancel** **Upload**

Below is an example of the schema. The "Prompt Text" is the question that appears in the software for the DTS specification. The VAR is the header row in your specifications upload and the text that helps the software identify where to map your answer. The field type tells you if the answer is in the form of a list value or a simple text answer.

The last column called “List Values” tells you what your answer options are in a drop down menu. You must use one of the options provided in order for the data to map correctly.

	A	B	C	D
1	Prompt Text	VAR	Field Type	List Values
2	PlanID	PlanID	Text	
3	Account Manager Email	AccountManagerEmail	Text	
4	Account Manager Fax	AccountManagerFax	Text	
5	Account Manager Name	AccountManagerName	Text	
6	Account Manager Phone	AccountManagerPhone	Text	

Step 4: Now that you have your Schema and your “Distributions Specifications Records” file, you’ll notice that the names in the “VAR” column appear as column headers in your spreadsheet with your plan data. Use the schema to help you fill out the “Distributions Specifications Records” spreadsheet. The schema indicates what the prompt text (question) will be in the DTS specifications and what the acceptable answers are, whether you’re answering a question with a list value or a simple text answer.

Below is an example of the spreadsheet containing your existing plan data. You must have these IDs in order for the software to properly map your answers within the DTS specifications. If you export existing plans, this will be populated for you and make the data entry process a little faster.

A	B	C	D	E	F
PlanID	FTWCustomerID	FTWPlanID	PlanNumber	CopmanyI	CustomerID
	343353137	384798742		1	12-1234567

Now you should start filing in your answers for each of the columns you want populated in the DTS specifications. If you do not add data to a column, the software will simply skip that question.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PlanID	FTWCustomerID	FTWPlanID	PlanNumk	CopmanyI	Customer	AccountM	AccountM	AccountM	AccountM	AddlFedW	AddlState	AlwaysRe
2		343353137	384798742		12-1234567						No	No	
3													
4													
5													
6													
7													
8													

Step 5: Once you are done with data entry, browse your computer for the DTS specifications. Keep in mind that if you have already filled in specifications, you can override existing answers with the upload. Any specifications you do not want to change, simply leave blank on the spreadsheet.

Specifications Schema is a list of acceptable fields to upload to th

**Upload File** DistributionSpecs\_Test.csv

Number of lines to skip:

[Download Distribution Specifications Records](#)

[Download DTS Specifications Schema](#)

You will then want to make sure that you put a zero in the box for “Number of lines to skip” if you do not have additional rows of data above the column header row in your spreadsheet. Click the “Upload” button.

Step 6: Now that you have uploaded your spreadsheet, you should receive a confirmation on the screen. If there were any issues with the spreadsheet, the software will produce a list of errors for you to look through so you can make adjustments. Note: if any issues were presented when uploading your data, none of the data on your spreadsheet will be uploaded until all data is correct].

All Statuses Selected

From



To



Find by Name or Distribution Type

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The download for the Distribution Specifications Records

Specifications Schema is a list of acceptable fields to use

**Upload File** DistributionSpecs\_Test.csv

Number of lines to skip:

[Download Distribution Specifications Records](#)

[Download DTS Specifications Schema](#)

### Upload Results

Invalid Column Name:  
Invalid Column Name: 343353137  
Invalid Column Name: 384798742  
Invalid Column Name: 1  
Invalid Column Name: 12-1234567  
Invalid Column Name:  
Invalid Column Name: Test@gmail.com  
Invalid Column Name:  
Invalid Column Name: Willow Everest  
Invalid Column Name: 555-555-5555  
Invalid Column Name: Yes  
Invalid Column Name: Yes  
Invalid Column Name: Yes  
Invalid Column Name:  
Invalid Column Name: TPA and Plan Sponsor  
Invalid Column Name: TPA and Plan Sponsor  
Invalid Column Name:  
Invalid Column Name: 20%  
Invalid Column Name: No  
Invalid Column Name:  
Invalid Column Name:

OK

Once your spreadsheet has been successfully uploaded, you will receive the confirmation below. Once you click, "OK", you will see that the specifications for each of your plans have now been populated.

### Global Distributions Specifications Upload

Close

To update plan distribution specifications, you must include one of the following ID combinations

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The download for the Distribution Specifications Schema is a list of accounts. Uploading/overriding specifications

Specifications Schema is a list of accounts.

#### Upload Results

Specifications successfully uploaded.

OK

**Upload File** DistributionSpecs\_Test.csv

Number of lines to skip:

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[Download DTS Specifications Schema](#)

Cancel

Upload