

# Page 1

# MANUAL UPLOAD INSTRUCTIONS

These instructions will help you understand how to properly fill out and send a member data file to MXM. This will allow MXM to import your file into our system so that you can accurately survey your members.

## It is important that the file is filled out correctly so that the Info you provide will be recognized by our processor.

Here are the steps:

**Step 1.** Open the Excel template named:

# MEMBER\_DATA\_SAMPLE.xlsx

#### It should look like this

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**Step 2.** Delete the sample row & input your member data Into the correct columns.

- Dates must be formatted as "MM/DD/YY"
- "MXM Identifier" is required for each record (row). MXM will assign one unique identifier per location
- "Date Cancelled" is optional, and may be left blank.

## The column headers need to remain as shown

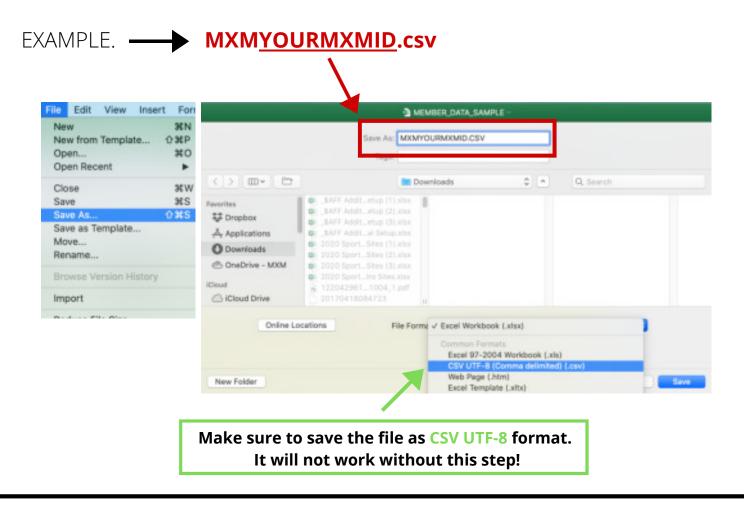
Notice that every customer record (row) must include the location's MXM Identifier or it cannot be processed



# Page 2 MANUAL UPLOAD INSTRUCTIONS

#### • Step 3. Saving and naming your file.

Use the following naming convention to start your file name



• LAST STEP!

Files can be uploaded securely at this location:

https://mxmetrics.com/memberdata/

We recommend uploading a file weekly. Files are typically processed within 24 hours.

If you have any questions during this process please contact MXM at: support@mxmetrics.com

