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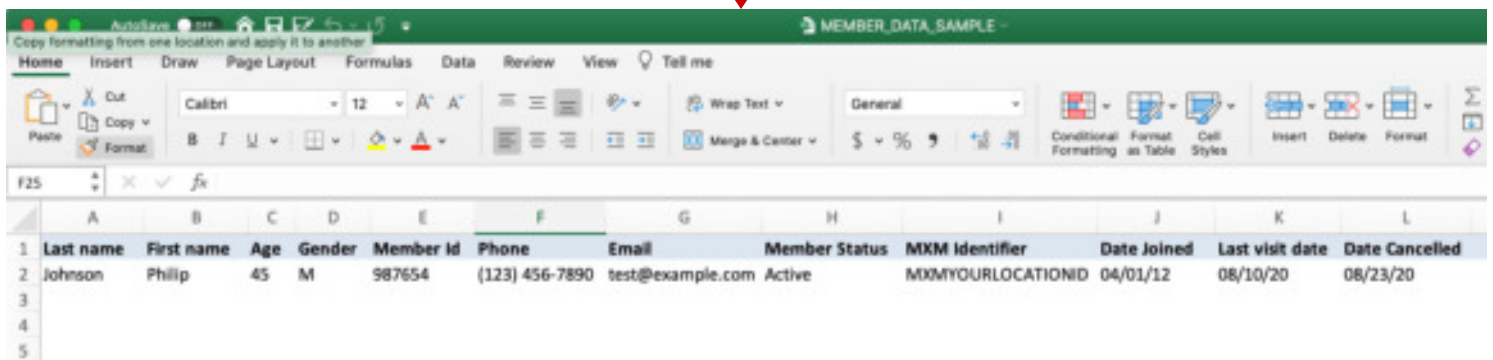
It is important that the file is filled out correctly so that the Info you provide will be recognized by our processor.

Here are the steps:

Step 1. Open the Excel template named:

MEMBER_DATA_SAMPLE.xlsx

It should look like this

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.
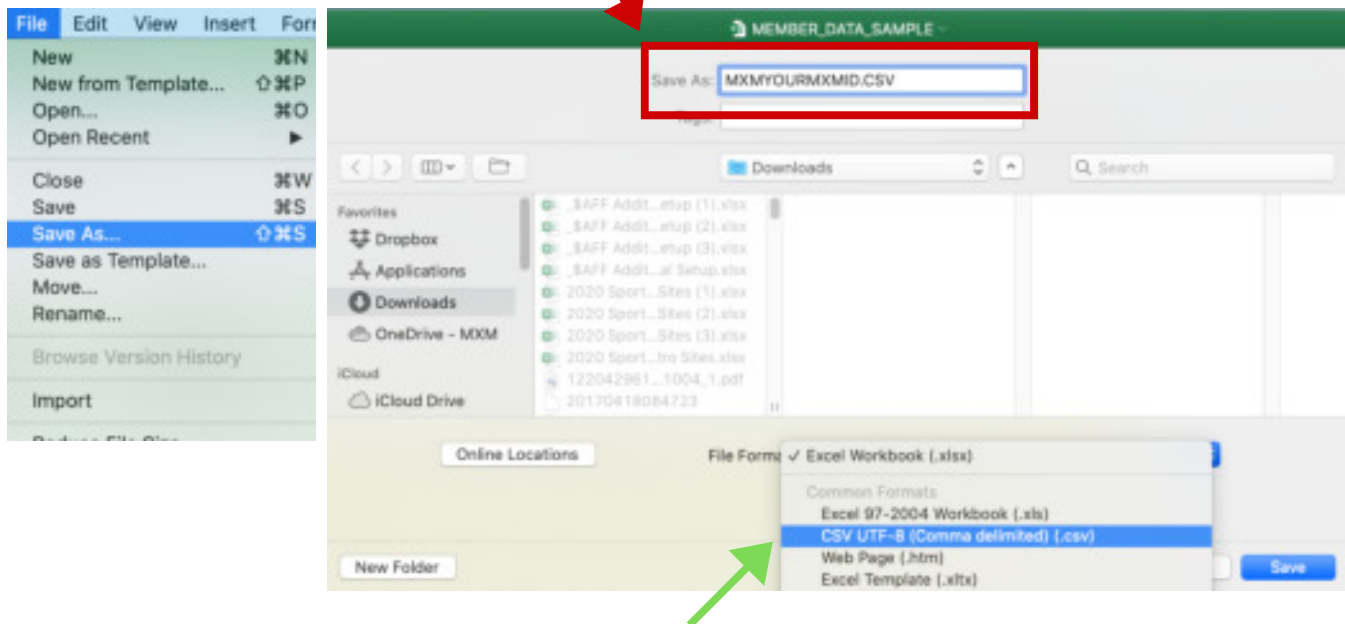
The column headers need to remain as shown
Notice that every customer record (row) must include the location's
MXM Identifier or it cannot be processed

MANUAL UPLOAD INSTRUCTIONS

- **Step 3. Saving and naming** your file.

  Use the following naming convention to start your file name

  EXAMPLE. ➡ **MXMYOURMXMID.csv**

Make sure to save the file as CSV UTF-8 format.
It will not work without this step!

- **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