

Using the Excel Template to Load your Inventory Report: Tips and Tricks

Generating the custom template from the Upload File Page

- Ensure you have all Pop-Up blockers turned off as the template will generate in a new pop-up window.

Saving the template

- Save the file locally on your computer. It cannot be submitted to CME DataPoint directly from the pop-up page. We recommend saving the file prior to entering the information, although it may be saved after as well.
- Save the file with the extension **.xls**. Other, newer Excel file versions are not accepted via DataPoint, such as .xlsx.
- Both Month and Year should be in numerical format, e.g. March 2010 should be entered as “3” in the Month field and “2010” in the Year field.

Formatting:

- It is recommended not to disturb the formatting of the template that is generated by the system. Altering the formatting on any of the cells, may result in errors when trying to upload and submit the template. If you are experiencing errors when loading your report, we recommend generating a new template, which will restore the appropriate formatting and then “copy” and “paste special/values only” your inventory data into the inventory section of the template. Month and year fields should be entered manually.

Content:

- The Quantity fields must be numerical, so when you complete a subscriber line, even if the quantity of users is 1, you must still fill out that number under the relevant products.
- **The products listed on the template are what we have listed as approved or licensed for your account.** If you wish to add products, or believe you should have additional or fewer products listed, please contact your account manager.
- All Country codes must be in two letter ISO Code format. A complete list is available here: http://www.iso.org/iso/english_country_names_and_code_elements
- It is perfectly OK if your subscriber list goes beyond the sum total rows at the bottom, you can delete those rows and continue entering you inventory.
- All address fields are required for each subscriber entry, with the exception of State and Postal Code. These two fields are only required for addresses in the US. All addresses are validated by the system, adhering to these requirements. If you have questions about this policy, please consult the MDLA or speak with your account manager.