

How to Upload Contacts by CSV File

What is a CSV File?

A CSV, or comma-separated values, is a type of file that allows you to enter data in a table-structured format or spreadsheet. You will need a program like Microsoft Excel to create the file to upload in your Participant Center.

If you have a lot of email contacts that you'd like to migrate into your Participant Center, creating a CSV file for upload may be easier and save you time instead of manually entering each email contact.

NOTE: *Yahoo and Gmail email users can directly import their contacts into the Participant Center without using a CSV file. View the separate help document for how to complete this action.*

Step-1 Prepare your CSV file

- A. Export your contacts list or address book from your email service that you use (follow your service provider's instructions to complete this step)
- B. Create a new CSV file using a text editor (such as Microsoft Windows Notepad) or a spreadsheet application (such as Microsoft Excel) that lets you save a document as a .CSV file type.
- C. Create three column headings: First, Last, Email
- D. Then, on the subsequent lines, enter the first name, last name and email address of each contact. (You can copy and paste this from the export that you did in Step 1 A.)

For example, your document would look like:

First, Last, Email

Jane, Smith, janesmith@email.com

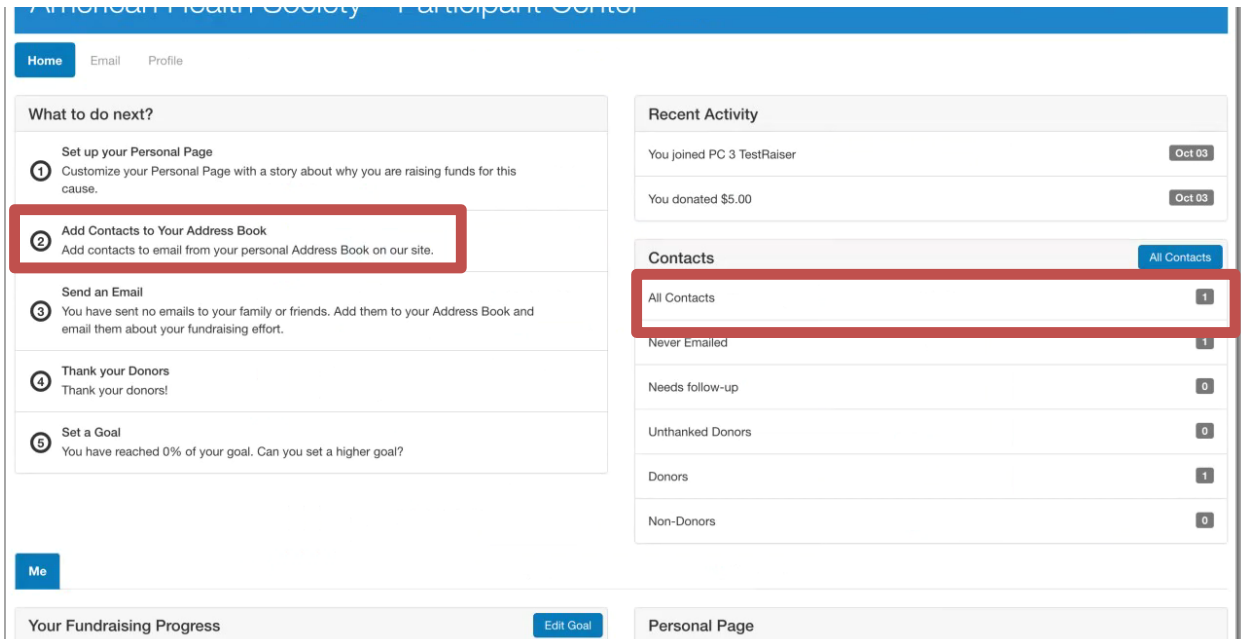
John, Smith, johnsmith@email.com

STEP 2- Login to your Participant Center

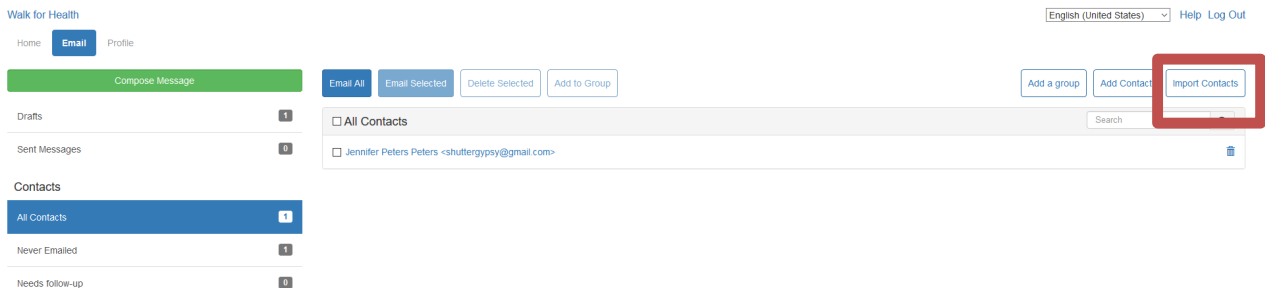


-CONTINUE ON NEXT PAGE-

STEP 3- On your Participant Center home page either click Step 2 under “What to do next?” or click the “All Contacts” tab to access the email and contact area.

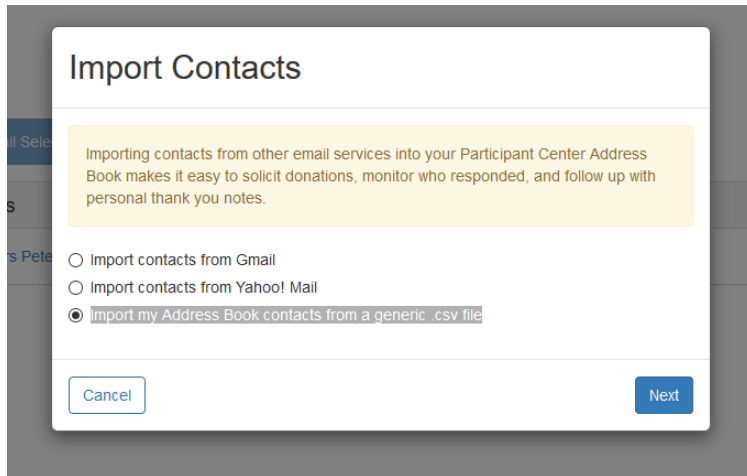


STEP 4- Click “Import Contacts”



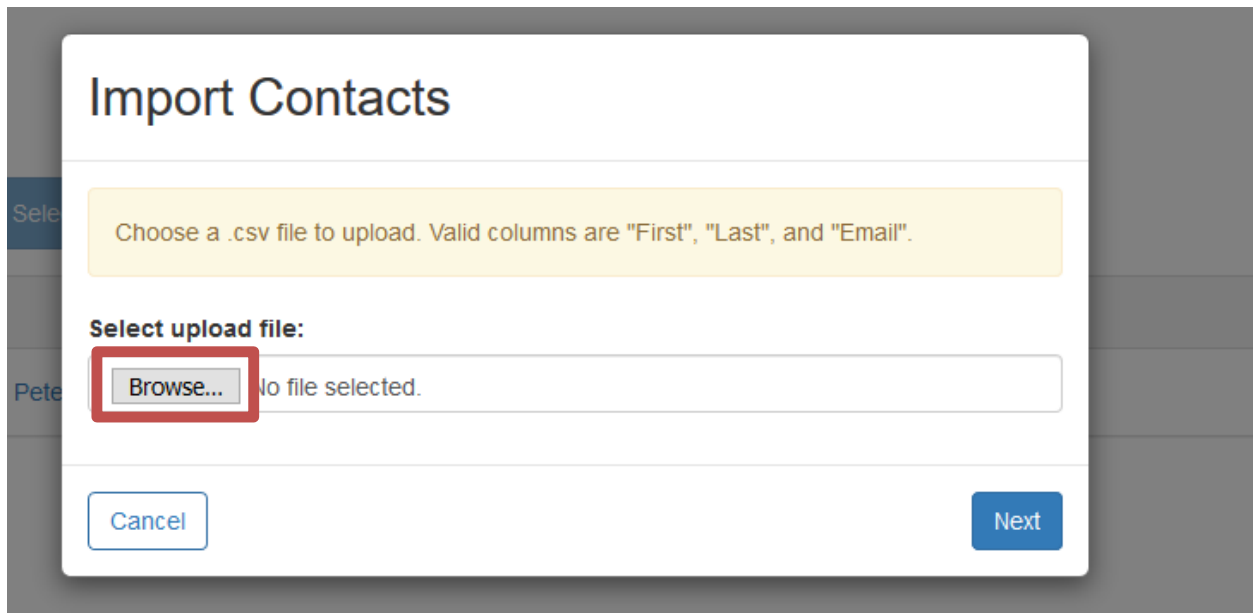
-CONTINUE ON NEXT PAGE-

STEP 5-Choose the button next to “Import my Address Book contacts from a generic .csv file...” and click Next.



The screenshot shows a dialog box titled "Import Contacts". At the top, there is a yellow informational box with the text: "Importing contacts from other email services into your Participant Center Address Book makes it easy to solicit donations, monitor who responded, and follow up with personal thank you notes." Below this, there are three radio button options: "Import contacts from Gmail", "Import contacts from Yahoo! Mail", and "Import my Address Book contacts from a generic .csv file". The third option is selected. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Next" on the right.

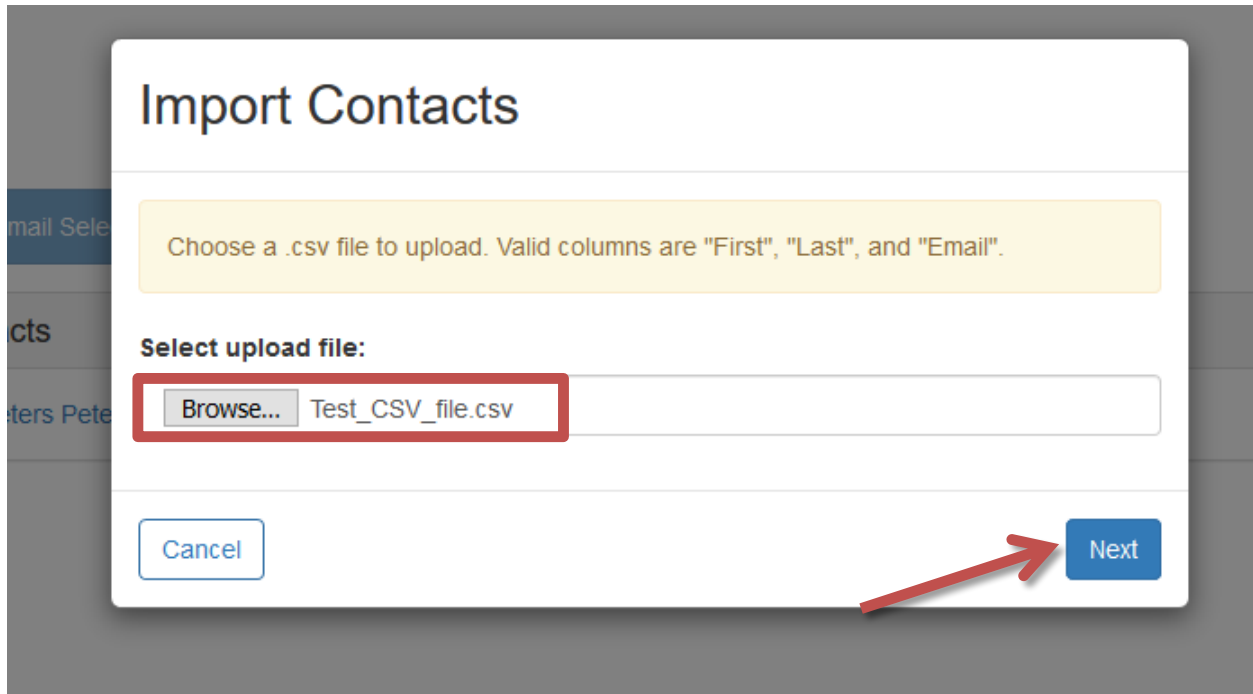
Click Browse to search your computer to find your prepared CSV file



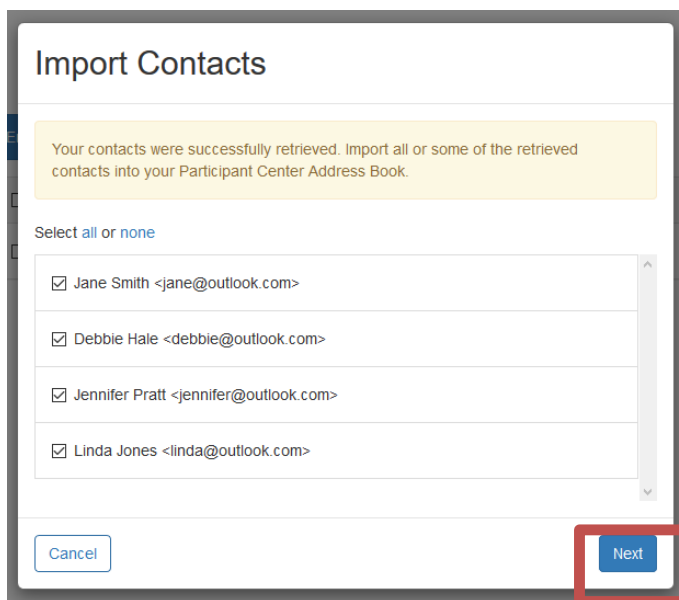
The screenshot shows the same "Import Contacts" dialog box. A yellow informational box at the top contains the text: "Choose a .csv file to upload. Valid columns are 'First', 'Last', and 'Email'." Below this, the text "Select upload file:" is followed by a text input field. Inside the input field, there is a "Browse..." button highlighted with a red rectangular box. To the right of the input field, it says "No file selected." At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Next" on the right.

-CONTINUE ON NEXT PAGE-

STEP 6- Once you have selected your file and you see it in the upload file window, click Next.



STEP 7- Preview the contacts from your file and either select All contacts or select the ones you wish to import. Click NEXT.



-CONTINUE ON NEXT PAGE-

STEP 8-SUCCESS! You will see a yellow text box showing how many of your contacts were successfully imported to your address book. Then, click “Finished” on the bottom of the page. You’re ready to start sending some emails!

The screenshot shows the Outlook web interface. At the top, there is a navigation bar with 'Walk for Health' on the left and 'English (United States) Help Log Out' on the right. Below this is a secondary navigation bar with 'Home', 'Email' (highlighted), and 'Profile'. The main interface is divided into two columns. The left column contains a 'Compose Message' button and a list of folders: 'Drafts' (1), 'Sent Messages' (0), 'Contacts' (with a sub-menu open showing 'All Contacts' (4), 'Never Emailed' (4), and 'Needs follow-up' (0)). The right column contains action buttons: 'Email All', 'Email Selected', 'Delete Selected', 'Add to Group', 'Add a group', 'Add Contact', and 'Import Contacts'. Below these buttons is a list of contacts under the heading 'All Contacts'. The list includes: 'Debbie Hale <debbie@outlook.com>', 'Linda Jones <linda@outlook.com>', 'Jennifer Pratt <jennifer@outlook.com>', and 'Jane Smith <jane@outlook.com>'. Each contact entry has a checkbox on the left and a trash icon on the right.