

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:

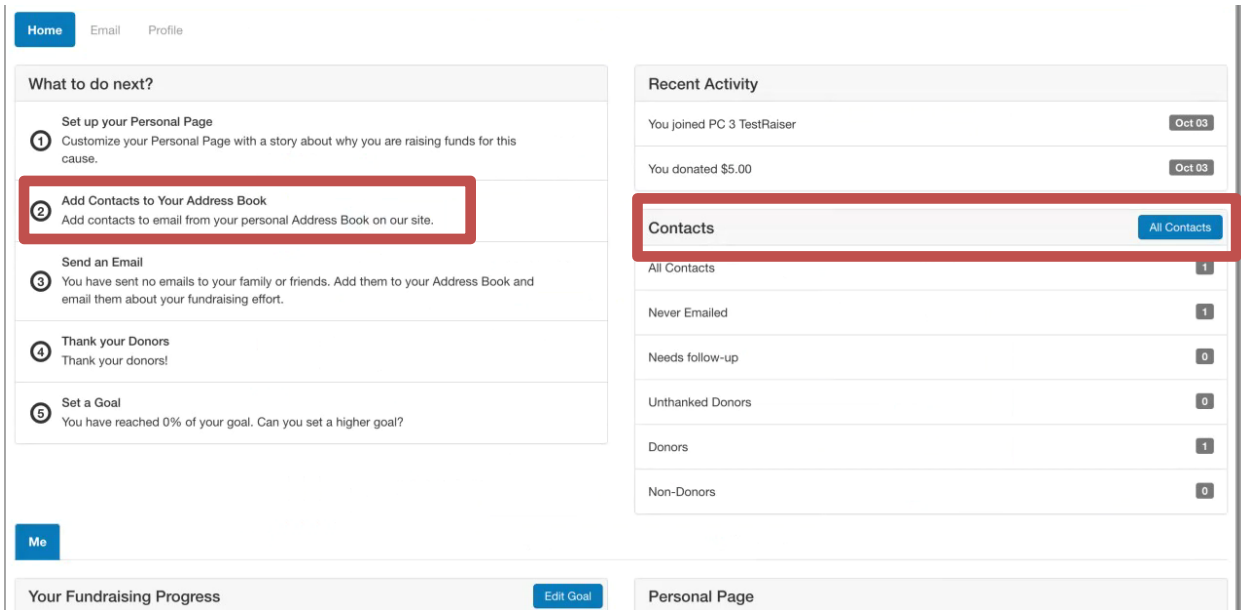
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First, Last, Email
Jane, Smith, janesmith@email.com
John, Smith, johnsmith@email.com
```

STEP 2- Login to your Participant Center

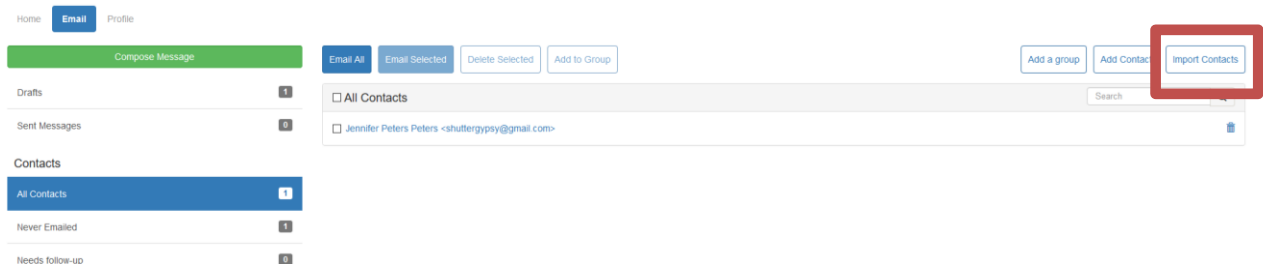


The screenshot shows a login window titled "Login" with a close button (X) in the top right corner. It contains two input fields: "User Name" and "Password". Below the fields is a "Login" button. At the bottom, there is a link that says "Forgot password or trouble logging in?".

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.

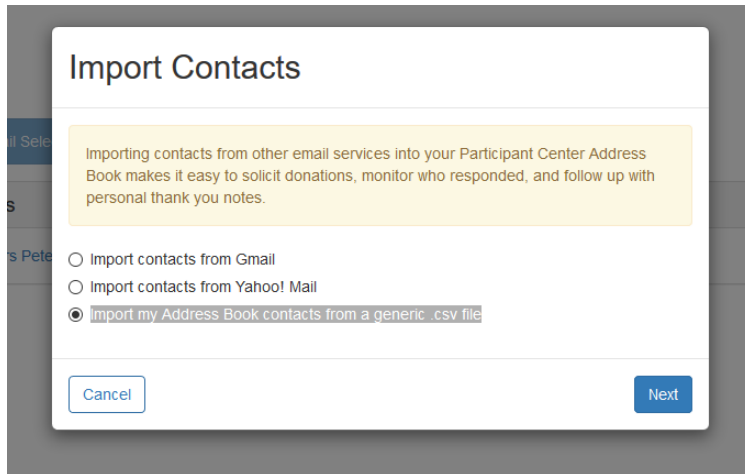


STEP 4- Click “Import Contacts”

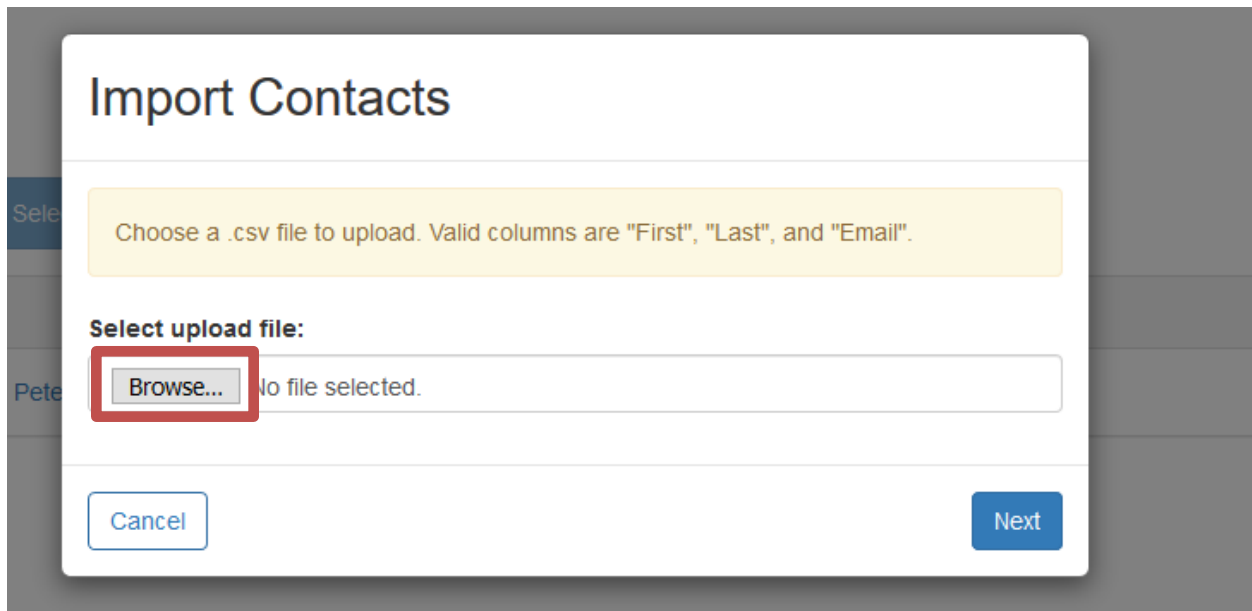


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STEP 5-Choose the button next to “Import my Address Book contacts from a generic .csv file...” and click Next.

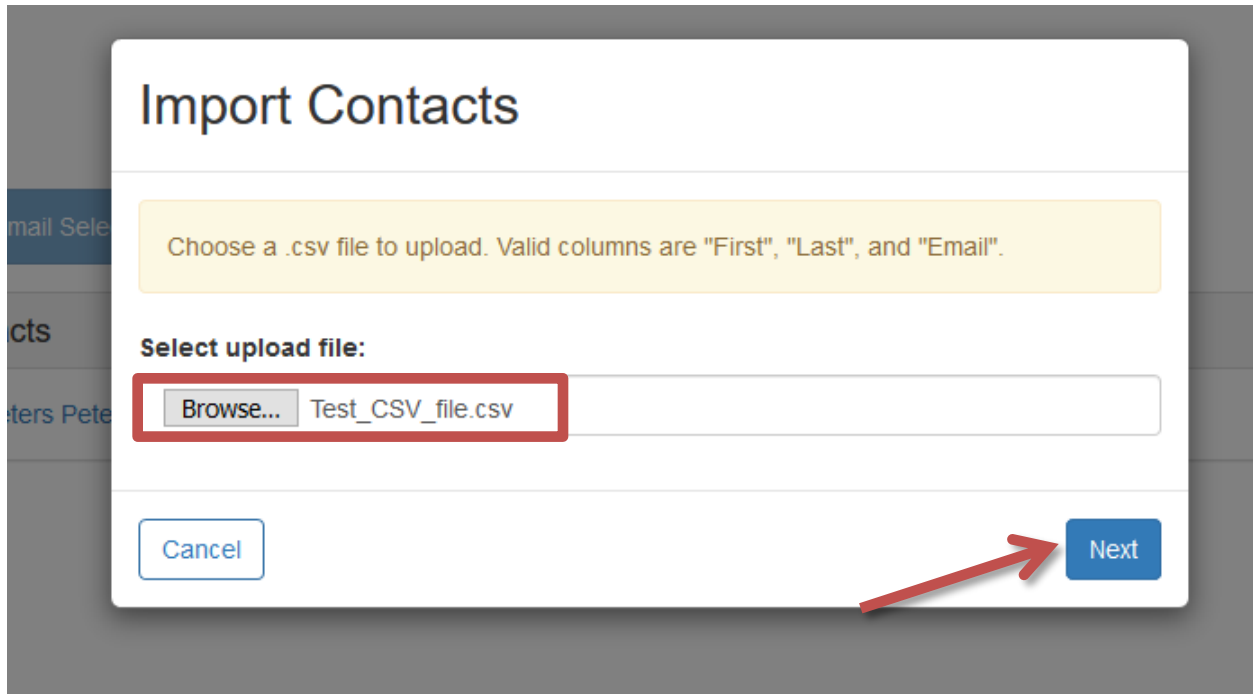


Click Browse to search your computer to find your prepared CSV file

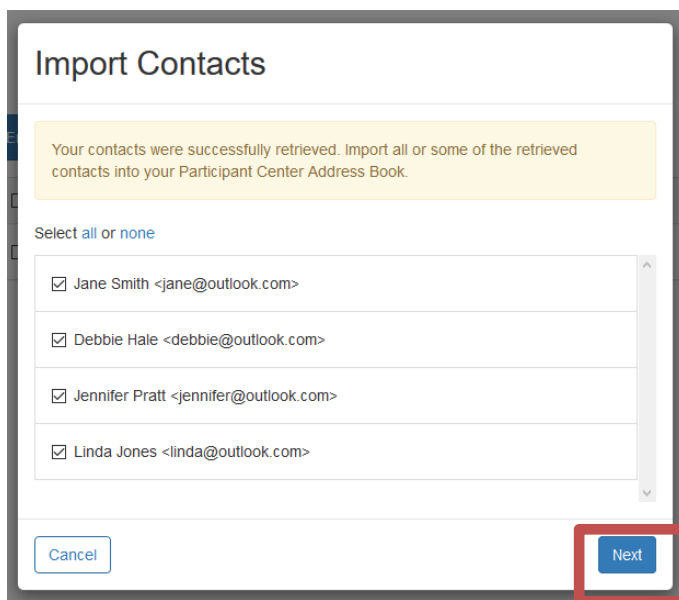


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STEP 6- Once you have selected your file and you see it in the upload file window, click Next.



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



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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 an email client interface. At the top, there are navigation tabs for 'Home', 'Email' (which is active), and 'Profile'. Below this is a 'Compose Message' button. A secondary toolbar contains 'Email All', 'Email Selected', 'Delete Selected', and 'Add to Group' buttons. On the right side, there are 'Add a group', 'Add Contact', and 'Import Contacts' buttons. On the left, a sidebar lists folders: 'Drafts' (1), 'Sent Messages' (0), 'Contacts' (with a sub-item 'All Contacts' selected and showing 4 contacts), 'Never Emailed' (4), and 'Needs follow-up' (0). The main contact list is titled 'All Contacts' and includes a search bar. It contains four entries, each with a checkbox, the contact name and email address, and a delete icon:

<input type="checkbox"/>	Contact Name & Email	Delete Icon
<input type="checkbox"/>	Debbie Hale <debbie@outlook.com>	
<input type="checkbox"/>	Linda Jones <linda@outlook.com>	
<input type="checkbox"/>	Jennifer Pratt <jennifer@outlook.com>	
<input type="checkbox"/>	Jane Smith <jane@outlook.com>	