

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 Centre.

If you have a lot of email contacts that you'd like to migrate into your Participant Centre, 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 Centre 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

Home About Fundraising Donate Register

User Login

* Required Fields

*User Name:

*Password:

remember me

Forgot your username or password?

Email me my Username and Password

* Required Fields

*Email (you registered with):

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

The screenshot shows the Participant Centre home page. On the left, the 'What to do next?' section contains six numbered steps. Step 2, 'Add Contacts to Your Address Book', is highlighted with a red box. It includes the sub-step: 'Add contacts to email from your personal Address Book on our site.' On the right, the 'Share' section has social media icons for Facebook, Twitter, and LinkedIn. Below it, the 'Recent Activity' section lists three events: 'You donated \$15.00' (Mar 24), 'You joined 2023 Lemonade Stands for Hope' (Mar 24), and 'You donated \$15.00' (Mar 24). The 'Contacts' section is highlighted with a red box and contains a table with the following categories and counts:

Category	Count
All Contacts	22
Never Emailed	22
Needs follow-up	0
Unthanked Donors	0
Donors	1

STEP 4- Click “Import Contacts”

The screenshot shows the email management interface. At the top right, there are links for 'English (United States)', 'Help', and 'Log Out'. Below the navigation bar, there are buttons for 'Compose Message', 'Email All', 'Email Selected', 'Delete Selected', and 'Add to Group'. On the right side, there are buttons for 'Add a group', 'Add Contacts', and 'Import Contacts', with the 'Import Contacts' button highlighted by a red box. The main content area shows a list of contacts, including 'All Contacts' and 'Jennifer Peters Peters <shuttergypsy@gmail.com>'. On the left side, there is a sidebar with 'Drafts' (1), 'Sent Messages' (0), and 'Contacts' (1) sections.

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

Import Contacts

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.

Import contacts from Gmail

Import contacts from Yahoo! Mail

Import my Address Book contacts from a generic .csv file

Cancel Next

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

Import Contacts

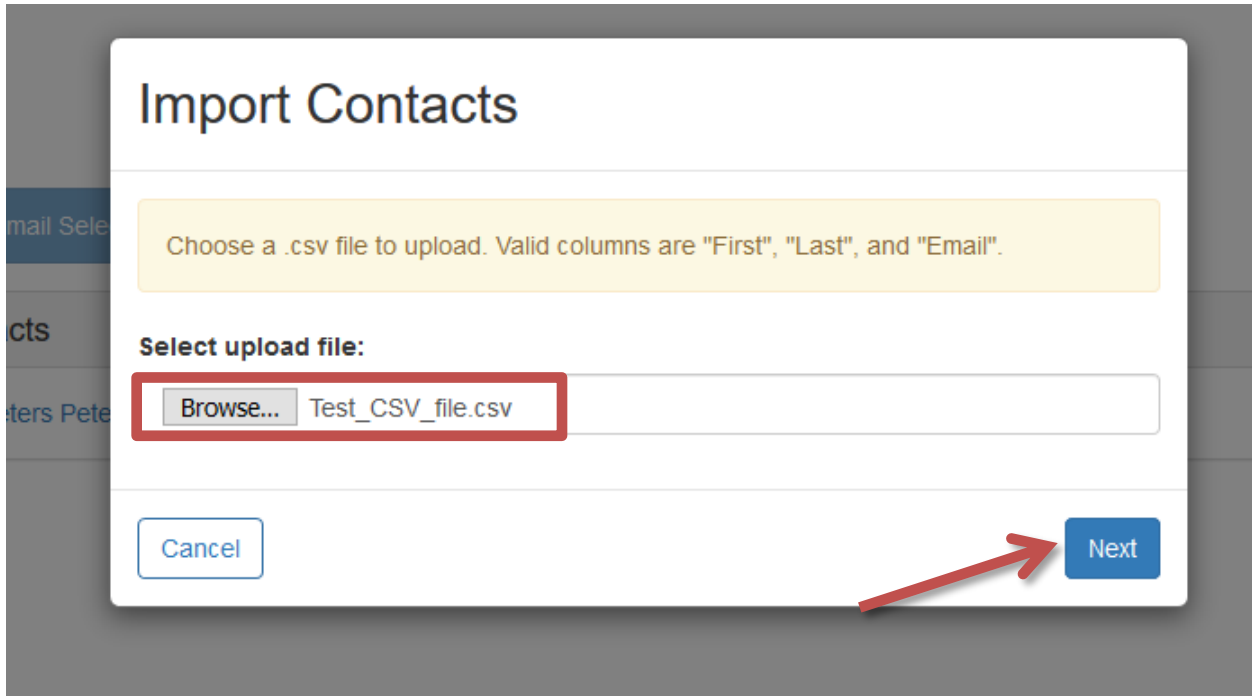
Choose a .csv file to upload. Valid columns are "First", "Last", and "Email".

Select upload file:

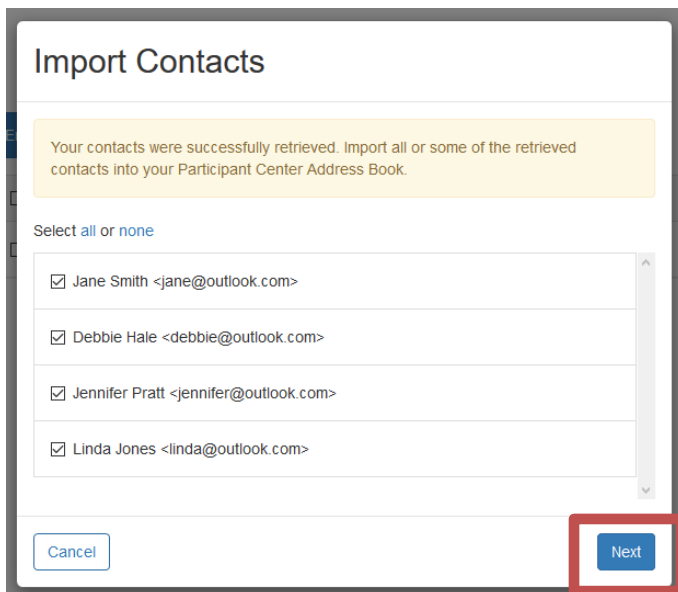
Browse... No file selected.

Cancel Next

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!

Walk for Health English (United States) ▾ [Help](#) [Log Out](#)

Home **Email** Profile

Compose Message

Email All Email Selected Delete Selected Add to Group

Add a group Add Contact Import Contacts

Drafts **1**

Sent Messages **0**

Contacts

All Contacts **4**

Never Emailed **4**

Needs follow-up **0**

All Contacts

Debbie Hale <debbie@outlook.com>

Linda Jones <linda@outlook.com>

Jennifer Pratt <jennifer@outlook.com>

Jane Smith <jane@outlook.com>