

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 or Windows Notepad 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.*

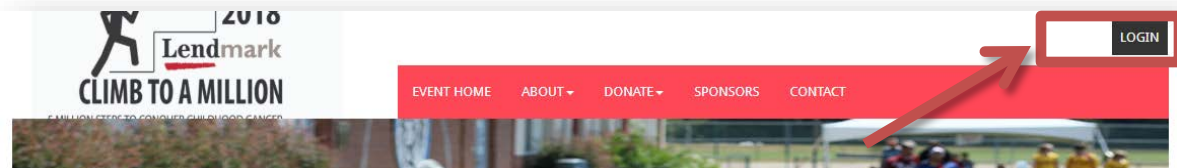
Step-1 Prepare your CSV file

- 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:

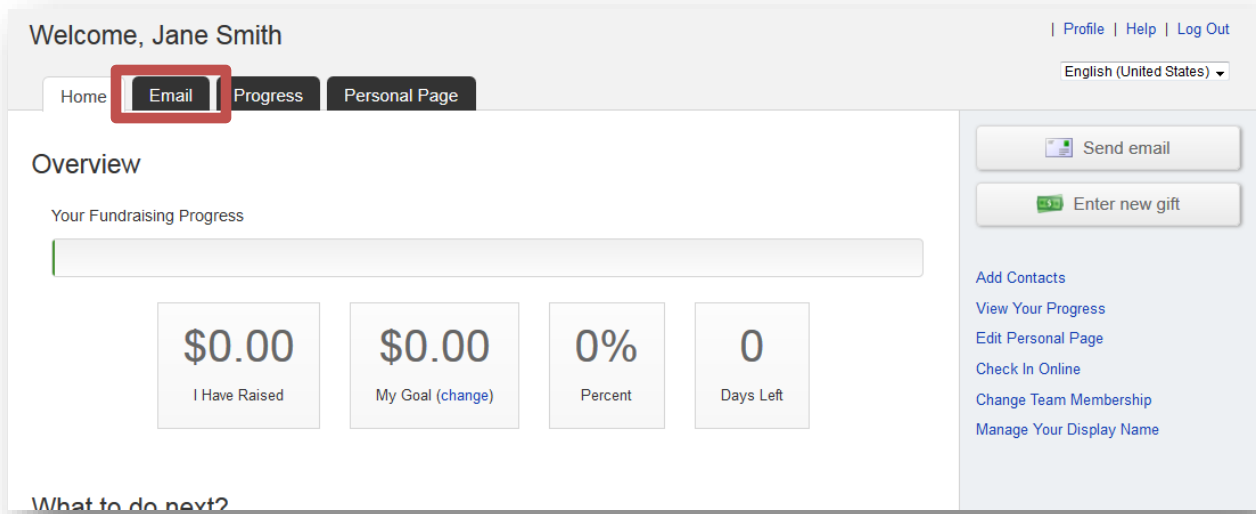
```
First, Last, Email  
Jane, Smith, janesmith@email.com  
John, Smith, johnsmith@email.com
```

STEP 2- Login to your Participant Center

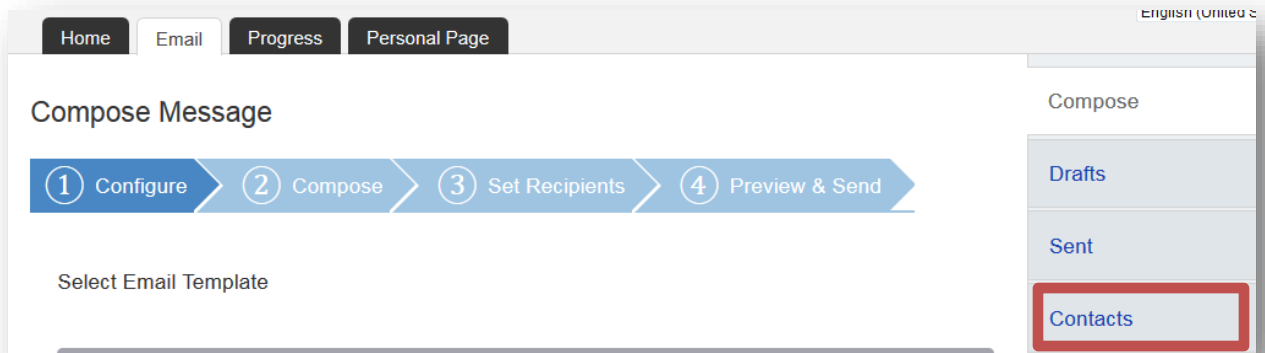


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STEP 3- On your Participant Center home page and click the “Email” tab to access the Email functionality.

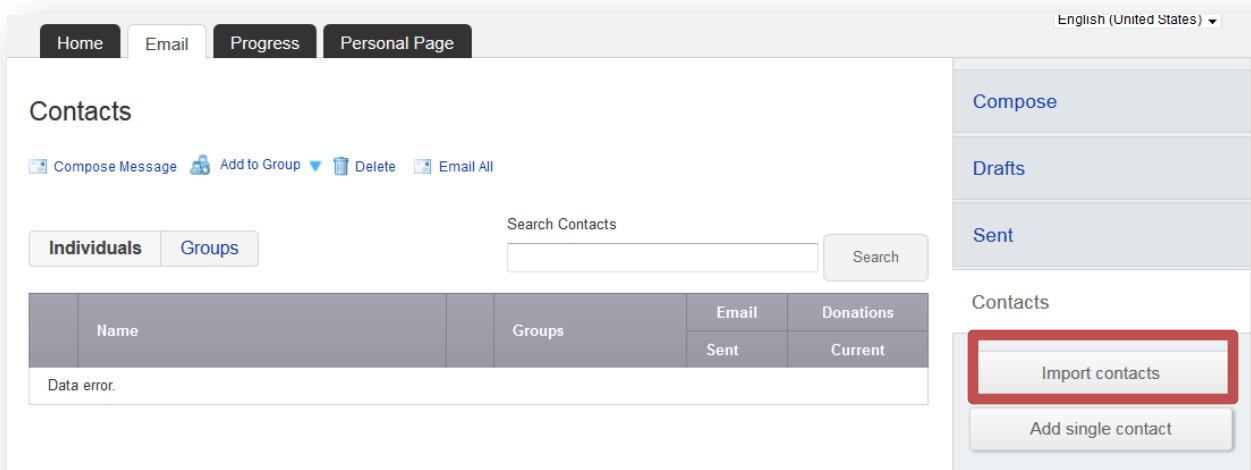


STEP 4-Click “Contacts” in the links on the right-side of the screen.

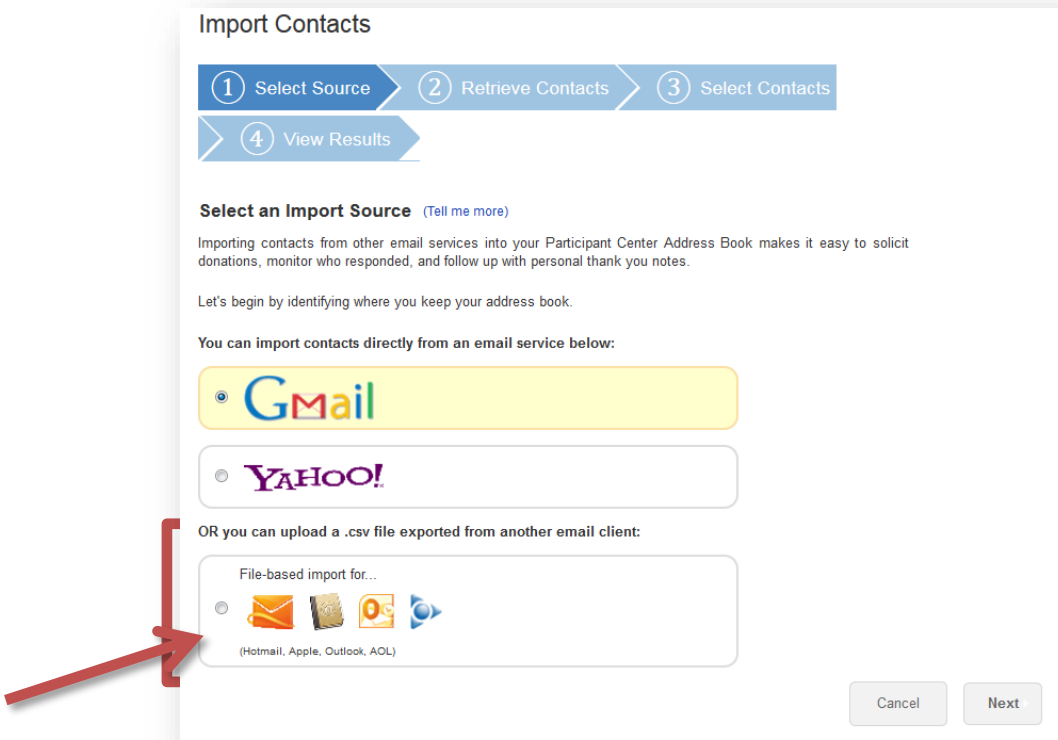


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STEP 5- Click "Import Contacts"

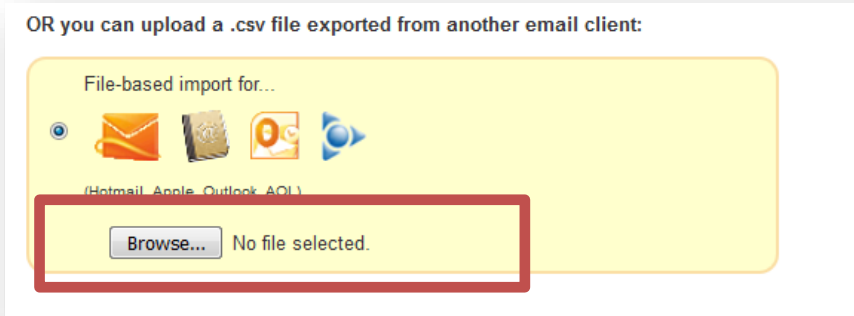


STEP 6-Choose the button next to "File-based import for..."

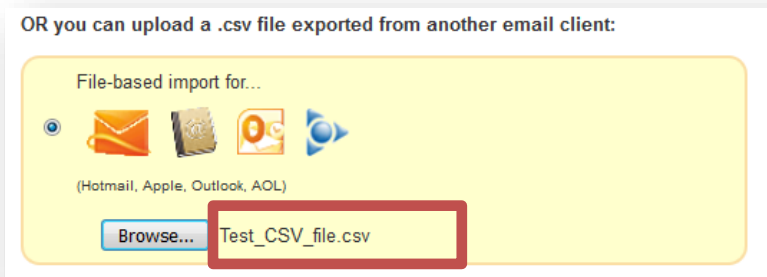


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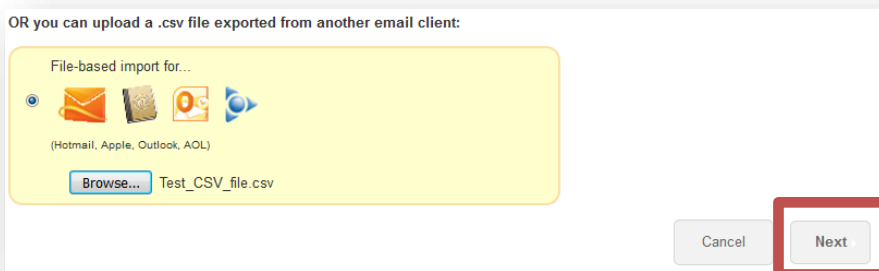
Next, browse your computer to find your prepared CSV file



Once you select your file, you'll see the file name on the screen.



STEP 7- Click "Next" to continue



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Step 8- Preview the contacts from your file and ensure they are mapped to the correct fields (i.e. first name, last name, email address). If you are satisfied with the results, click NEXT. If you need to adjust the mapping, click “change the column mapping” to fix.

Home | Email | Progress | Personal Page | CONTINUE ON NEXT PAGE-

Import Contacts

1 Select Source → 2 Retrieve Contacts → 3 Select Contacts
4 View Results

Retrieve Contacts [\(Tell me more\)](#)

Contacts were retrieved from your .csv file. Review the CSV column mapping preview and confirm that it is correct.

Does this preview look correct?
If not, you can [change the column mapping or the encoding](#).

| Proposed First Name | Proposed Last Name | Proposed Email |
|---------------------|--------------------|----------------------|
| Jane | Smith | jane@outlook.com |
| Debbie | Hale | debbie@outlook.com |
| Jennifer | Pratt | jennifer@outlook.com |
| Linda | Jones | linda@outlook.com |

... and 0 additional contacts not displayed in the above preview.

Cancel **Next**

STEP 9- Select Contacts to Import

In most cases you'll want to import all of the contacts that are in your uploaded file. To do so, select the first radio button that says “Import all # contacts into your Participant Center Address Book.”

The screenshot shows a web interface for importing contacts. At the top, there are navigation tabs: Home, Email, Progress, and Personal Page. Below the tabs is the title 'Import Contacts'. A progress bar consists of four steps: 1. Select Source, 2. Retrieve Contacts, 3. Select Contacts, and 4. View Results. Step 3 is currently active. Below the progress bar is a section titled 'Select Contacts to Import' with a red border. The text in this section reads: 'Your contacts were successfully retrieved. Import all or some of the retrieved contacts into your Participant Center Address Book.' There are two radio button options: 'Import all 5 contacts into your Participant Center Address Book.' (which is selected) and 'Import some of the retrieved contacts into your Participant Center Address Book.' At the bottom right of the interface, there are two buttons: 'Cancel' and 'Next', with the 'Next' button highlighted with a red border.

Home Email Progress Personal Page

Import Contacts

1 Select Source 2 Retrieve Contacts 3 Select Contacts 4 View Results

Select Contacts to Import

Your contacts were successfully retrieved. Import all or some of the retrieved contacts into your Participant Center Address Book.

- Import **all 5** contacts into your Participant Center Address Book.
- Import **some** of the retrieved contacts into your Participant Center Address Book.

Cancel Next

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Or...if you only want to select certain contacts to transfer over, check the “Select box” next to the individuals that you do want in your Participant Center contacts.

Select Contacts to Import

Your contacts were successfully retrieved. Import all or some of the retrieved contacts into your Participant Center Address Book.

- Import **all 5** contacts into your Participant Center Address Book.
 Import **some** of the retrieved contacts into your Participant Center Address Book.

(Select all or none)

| | First Name | Last Name | Email |
|--------------------------|------------|-----------|----------------------|
| <input type="checkbox"/> | | | |
| <input type="checkbox"/> | Jane | Smith | jane@outlook.com |
| <input type="checkbox"/> | Debbie | Hale | debbie@outlook.com |
| <input type="checkbox"/> | Jennifer | Pratt | jennifer@outlook.com |
| <input type="checkbox"/> | Linda | Jones | linda@outlook.com |

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STEP 10-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!

Import Contacts

- 1 Select Source
- 2 Retrieve Contacts
- 3 Select Contacts
- 4 View Results

View and Work with Results [\(Tell me more\)](#)

Results of the contact import are listed in the sections below.

 **4 Successfully Saved Contacts, 4 New**

▾ **Successfully Saved Contacts**

This list shows the retrieved contacts that were successfully saved into your Participant Center Address Book.

| First Name | Last Name | Email |
|------------|-----------|----------------------|
| Jane | Smith | jane@outlook.com |
| Debbie | Hale | debbie@outlook.com |
| Jennifer | Pratt | jennifer@outlook.com |
| Linda | Jones | linda@outlook.com |

[Finished](#)