

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.

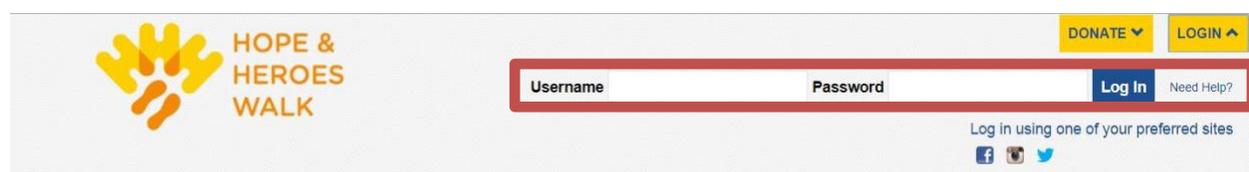
Step 1 – Prepare your CSV file

- 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	Doe	jane.doe@nomail.net
John	Doe	Jdoe@aol.com

Step 2 – Login to your Participant Center



HOPE & HEROES WALK

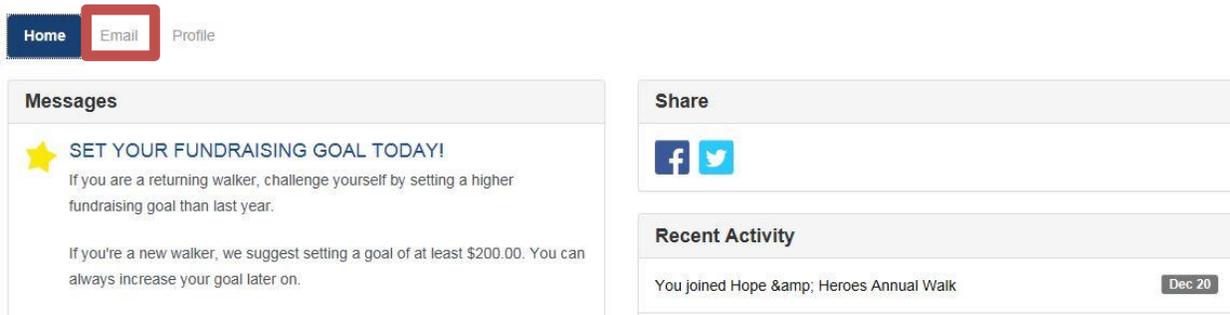
DONATE ▾ LOGIN ▲

Username Password Log In Need Help?

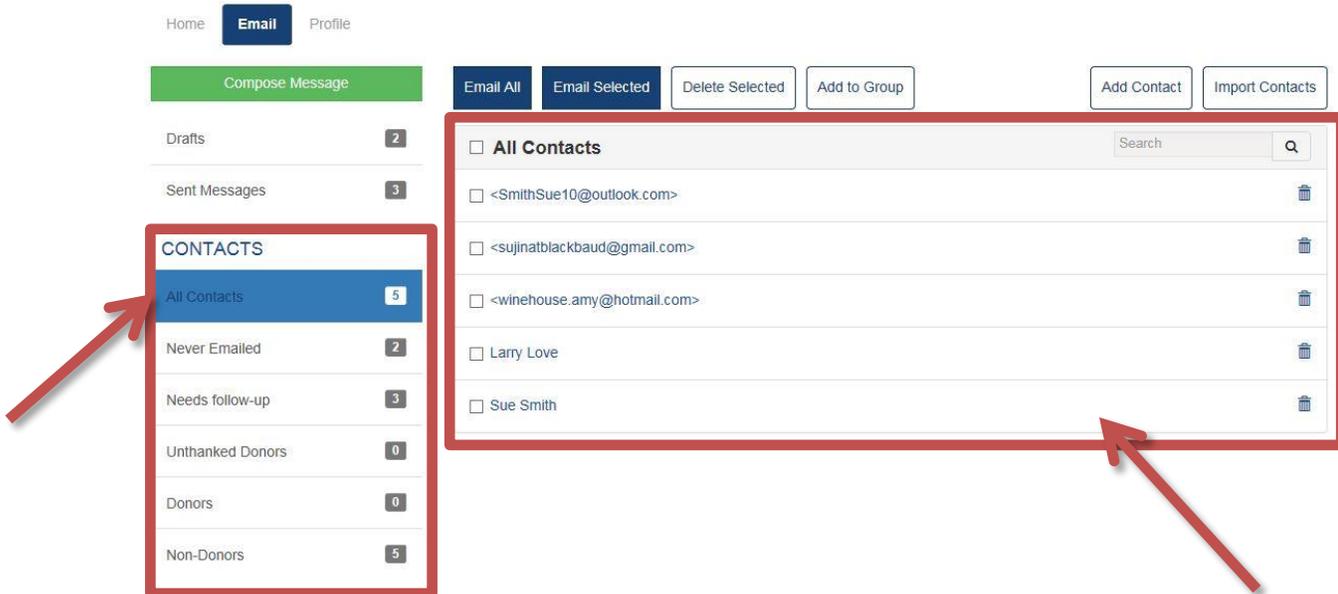
Log in using one of your preferred sites

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



Step 4 – Locate your “Contacts” in the links on the left-side of the screen. Click each contact type (all, never emailed, needs follow-up, etc.) to bring up the contacts in the mail screen



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Step 5 – Click “Import Contacts”



Step 6 – Choose the button to “Import my Address Book contacts from a generic .csv file.” Then click the “Next” button.

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

Select the “Browse” button to access your computer.

Locate the .csv file you have saved on your computer and click the “Open” button.

Import Contacts

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

Select upload file:

Browse...

Once you select your file, you'll see the file name on the screen. Click “Next” to continue.

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Import Contacts

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

Select upload file:

C:\Users\kw2718\2019 W Browse...

CANCEL

NEXT

Step 7 – 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 "All" link or check all the names**. Then click the **"Next"** button.

Import Contacts

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

Select all or none

Jane Doe <jane.doe@nomail.net>

John Doe <Jdoe@aol.com>

Mary Doe <marydoe2@msn.com>

Tim Doe <TimD@syr.edu>

CANCEL

NEXT

If you **only want to select certain contacts** to transfer, check the **"Select box"** next to those individuals. Then click the **"Next"** button.

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Import Contacts

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

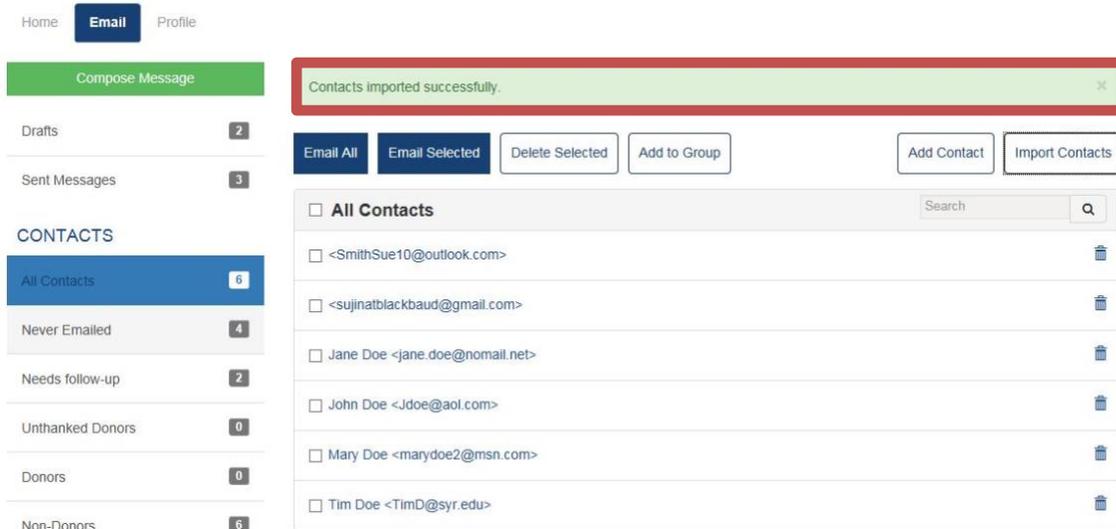
Select all or none

<input type="checkbox"/>	Jane Doe <jane.doe@nomail.net>
<input type="checkbox"/>	John Doe <Jdoe@aol.com>
<input type="checkbox"/>	Mary Doe <marydoe2@msn.com>
<input type="checkbox"/>	Tim Doe <TimD@syr.edu>

CANCEL

NEXT

Step 8 – SUCCESS! You will see a text box confirming your contacts were successfully imported to your address book. **You're ready to start sending emails!**



The screenshot shows an email client interface with a navigation bar (Home, Email, Profile) and a left sidebar with folders like Drafts (2), Sent Messages (3), and CONTACTS (All Contacts 6, Never Emailed 4, Needs follow-up 2, Unthanked Donors 0, Donors 0, Non-Donors 6). A green notification box at the top right says "Contacts imported successfully." Below it are buttons for "Email All", "Email Selected", "Delete Selected", "Add to Group", "Add Contact", and "Import Contacts". The main area shows a list of "All Contacts" with a search bar and checkboxes for each contact: <SmithSue10@outlook.com>, <sujinatblackbaud@gmail.com>, Jane Doe <jane.doe@nomail.net>, John Doe <Jdoe@aol.com>, Mary Doe <marydoe2@msn.com>, and Tim Doe <TimD@syr.edu>. Each contact has a trash icon to its right.