

Reference Guide

Importing Contacts to Your Participant Center

In this hand out, you will find instructions on how you can easily import contacts and send fundraising email messages through your Participant Center. The software allows you to import contacts automatically from several popular email providers such as Gmail, Yahoo, Outlook, AOL, Hotmail and more. The Luminate Online Help is a great resource to assist you in importing your email contact list from third party email services.

Luminate Online Help Links:

- [Importing Contacts through Google Gmail](#)
- [Importing Contacts through Yahoo!](#)
- [Importing Contacts through a File-Based Import \(Outlook, AOL, Hotmail, Apple, others\)](#)

For your convenience, JDRF has provided additional help for importing contacts in this document. Continue reading for more information.

Importing Contacts Through Google Gmail

The following instructions will guide you through the process of importing your Google Gmail contacts into the JDRF Participant Center.

1. Log in to your JDRF Participant Center from the appropriate event website:
Walk to Cure Diabetes: walk.jdrf.org
Ride to Cure Diabetes: ride.jdrf.org
Team JDRF to Cure Diabetes: team.jdrf.org
Kids Walk to Cure Diabetes: kidswalk.jdrf.org
2. Choose the event for which you are registered
3. From the "Participant Center," go to the "Fundraising and Email" tab and select "Send Emails".
4. Select the "Your Contacts" link in the right hand navigation area.
5. Click on the "Import Contacts" link.
6. Choose the "Gmail" button and select "Next."

Import Contacts

Select an Import Source

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. Let's begin by identifying where you keep your address book.

[Tell me more.](#)





You can import contacts directly from an email service below:

☐ **Gmail**

☐ **YAHOO!**

OR you can upload a .csv file exported from another email client:

File-based import for...

☐





(Hotmail, Apple, Outlook, AOL)

[Tell me more.](#)

[Cancel](#) or [Next](#)

7. Sign in to your Gmail account using your Gmail username and password.
8. The Convio.net system will prompt you to allow access to your Gmail contacts – select “Grant Access”
9. Once the system has retrieved your contacts, select “Next.”
10. You will be prompted to select some or all of your contacts – choose the desired option and select “Next.”
11. The results of the import will be displayed. Refer to the [Luminate Online Help link for Gmail](#) to resolve duplicates or make notes about rejected contacts.

If you experience difficulty importing your Gmail contacts, please contact the JDRF Client Services team at onlinesupport@jdrf.org

Importing Contacts Through Yahoo!

The following instructions will guide you through the process of importing your Yahoo! email contacts into the JDRF Participant Center.

1. Log in to your JDRF Participant Center from the event website which you are participating in:
 Walk to Cure Diabetes: walk.jdrf.org
 Ride to Cure Diabetes: ride.jdrf.org
 Team JDRF to Cure Diabetes: team.jdrf.org
 Kids Walk to Cure Diabetes: kidswalk.jdrf.org
2. Choose the event for which you are registered
3. From the “Participant Center,” go to the “Fundraising and Email” tab and select “Send Emails”.
4. Select the “Your Contacts” link in the right hand navigation area.
5. Click on the “Import Contacts” link.
6. Choose the “Yahoo!” button and select “Next.”

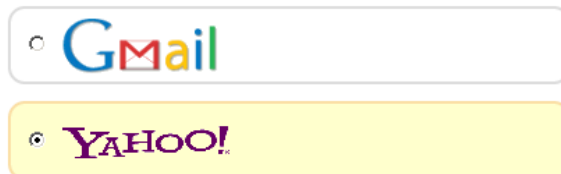
Import Contacts

Select an Import Source

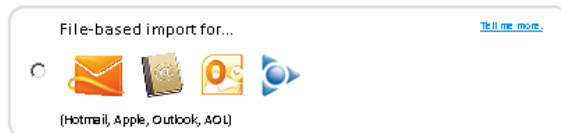
Importing contacts from other email services into your Participant Center Address Book makes it easy to solicit donations, monitor who responded, and follow up with personal thank you notes. Let's begin by identifying where you keep your address book.

[Tell me more.](#)

You can import contacts directly from an email service below:



OR you can upload a .csv file exported from another email client:



[Tell me more.](#)

[Cancel](#) or [Next](#)

7. Sign in to your Yahoo! account using your Yahoo! username and password
8. The Convio.net system will prompt you to allow access to your Yahoo! contacts – select “Accept.”
9. Once the system has retrieved your contacts, select “Next.”
10. You will be prompted to select some or all of your contacts – choose the desired option and select “Next.”
11. The results of the import will be displayed. Refer to the [Luminate Online Help link for Yahoo!](#) to resolve duplicates or make notes about rejected contacts.

If you experience difficulty importing your Yahoo! contacts, please contact the JDRF Client Services team at onlinesupport@jdrf.org

Importing Contacts Through .CSV File-Based Import

Many popular email software applications include features to allow you to export your email contacts to a Comma Separated Values (.csv or CSV) file for use in other applications. Before uploading your contacts into the "Participant Center," you will need to export them into a .csv file format. Specific instructions for exporting contacts vary by provider. Links to instructions for a few popular providers are included below.

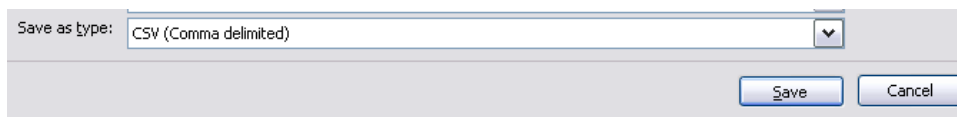
- [Exporting Contacts from Microsoft Outlook](#)
- [Exporting Contacts from AOL](#)
- [Exporting Contacts from Hotmail](#)
- [Exporting Contacts from Apple](#)

After you have exported your contacts to a .csv file, you can import them into the Participant Center email tool using the following instructions

1. Log in to your JDRF Participant Center from the event website which you are participating in:
Walk to Cure Diabetes: walk.jdrf.org
Ride to Cure Diabetes: ride.jdrf.org
Team JDRF to Cure Diabetes: team.jdrf.org
Kids Walk to Cure Diabetes: kidswalk.jdrf.org
2. Choose the event for which you are registered
3. From the "Participant Center," go to the "Fundraising and Email" tab and select "Send Emails".
4. Select the "Your Contacts" link in the right hand navigation area.
5. Click on the "Import Contacts" link.
6. Choose the "File Based Import For..." button.
7. Select the "Browse" button, locate your exported .csv* contact list on your computer and select the "Open" button.
8. Select "Next."

A preview of your contact list will be displayed. If the preview looks correct, you can simply select the "Next" button and your contacts will be imported into your "Participant Center."

Note: It is important to ensure that the data in your .csv file is as clean as possible. The First Name and Last Name fields are particularly important. If the First and Last Name fields contain non-alphanumeric characters such as () ' / & % @ ; , " , participants may experience errors when attempting to send email messages to their contacts through the Participant Center. Also, make sure you save the file as a ".csv" file.



A sample .csv contact list template is available if you click the "Tell Me More" hyperlink.

Import Contacts

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

[Tell me more.](#)

Does this preview look correct?

If not, you can [change the column mapping or the encoding.](#)

Proposed First Name	Proposed Last Name	Proposed Email
John	Smith	jsmith@test.com
Jane	Black	jblack@test.com
Bob	Thompson	bthompson@test.com

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

[Cancel](#) or [Next](#)

You can remap the columns if they are not correct. For example, you may choose to use a Nickname column as your first name. If the system matched the First Name column in your file incorrectly, you must choose the correct column to use from your .csv file.

*Column Mapping

1. On the Preview page, examine the 3 columns of information.
2. If a column of information was not the column you expected:
 - Select “change the column mapping or the encoding” link.
 - Select the drop-down list on the column and select the actual column from the .csv file that should be used.

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

[Tell me more.](#)

Does this preview look correct?

If not, you can [change the column mapping or the encoding.](#)

File Encoding:

ASCII

Proposed First Name	Proposed Last Name	Proposed Email
(1) First Name	(2) Last Name	(3) Email
(1) First Name	Smith	jsmith@test.com
(2) Last Name	Black	jblack@test.com
(3) Email	Bob	bthompson@test.com

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

[Cancel](#) or [Next](#)

3. If the .csv file is encoded in something other than ASCII, select the correct option from the Encoding drop-down list.

Select the Contacts You Want Import

1. Choose to “Import All Contacts” or “Only Selected Contacts.”
2. Select “Next.”

Resolve Duplicate Contacts

1. Select anywhere in the “Possible Duplicate Contacts” heading.
2. In the list displayed, if the contact:
 - Already exists in your “Participant Center Contacts” list with a variation of this information, select:
 - “Update” icon to replace the name or email address in your Participant Center with the one from the .csv file.
 - “Ignore” icon to keep the information as is in your Participant Center Contacts list.
 - If someone is different, select the “Add” icon to copy this contact into your Participant Center Contacts list.

File Encoding:

ASCII
ASCII
ISO-8859-1
Windows-1252
UTF-8
UTF-16
UTF-16BE
UTF-16LE

Finish the Import and Return to the Contacts List

1. Select the “Finish” button (located below the lists).
2. On the confirmation pop-up displayed, select “Confirm Finished.”

If you experience difficulty importing your contacts from a .csv file, please contact the JDRF Client Services team at onlinesupport@jdrf.org

Thank you for your support of JDRF!

If you need assistance, please contact our tech support hotline at (855) 835-9255 or email onlinesupport@jdrf.org