

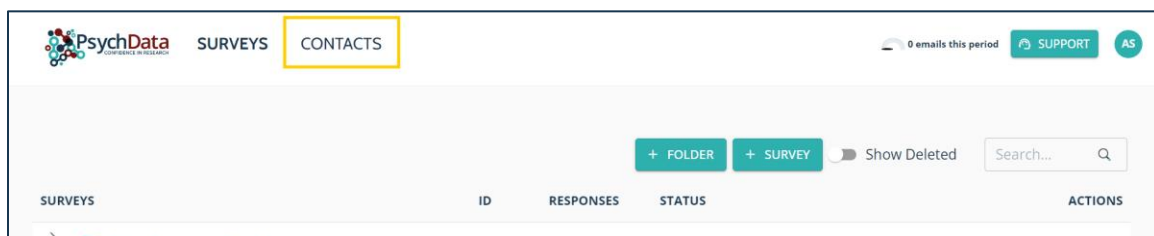
Creating a Contact List

Step 1: Access Your Account

[Sign into](#) your account and follow these steps to create a survey in the PsychData tool.

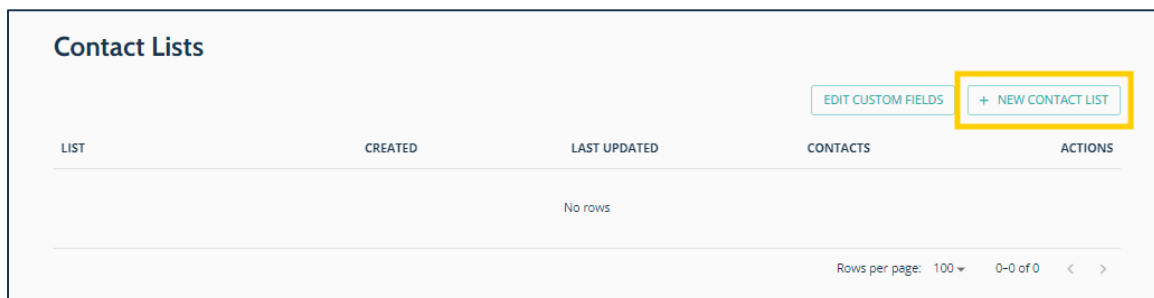
Step 2: Locate the Contact Lists Tab

Click on the “Contacts” tab in the top left corner of the page.



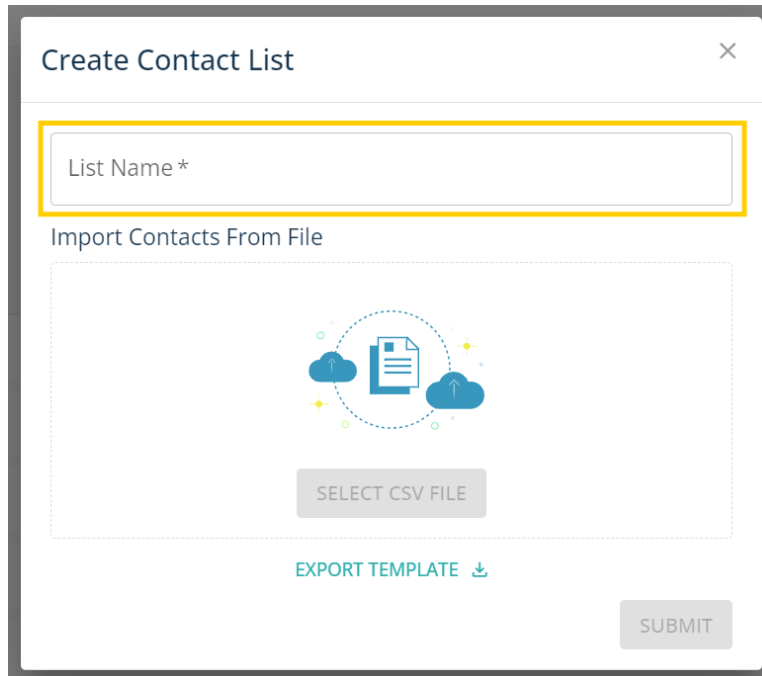
Step 3: Create List

Click “New Contact List”



Step 4: Name Your List

Enter the desired name for the list into the “List Name” field



Create Contact List

List Name *

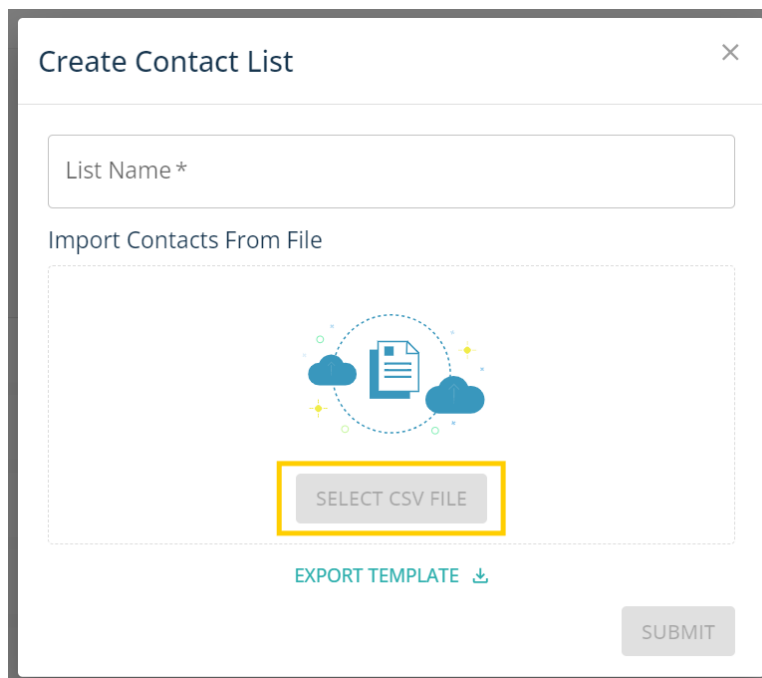
Import Contacts From File

SELECT CSV FILE

EXPORT TEMPLATE ↓

SUBMIT

Step 5a: Import Contacts (Optional)



Create Contact List

List Name *

Import Contacts From File

SELECT CSV FILE

EXPORT TEMPLATE ↓

SUBMIT

Click “Select CSV File” and upload a spreadsheet with the contacts you need, click continue after checking information is correct.

(If your spreadsheet is not in the correct format, you can click “Export Template” and download the template to put your list in the correct format.)

A popup will appear that will allow you to double check and make sure that the fields match up with the correct information.

Create Contact List ✕

[← BACK](#)

First row is a header

Map the fields from your imported file (in the first column) to the fields found within your PsychData account (in the second column).

Imported file (4 rows)	PsychData Contact Fields
email <i>a.asher@gmail.com</i>	Email
phone	Phone
firstName <i>Able</i>	First Name
lastName <i>Asher</i>	Last Name

[+ ADD CUSTOM FIELD](#) [CONTINUE](#)

Once you've verified that the information and fields match up, click "Continue."

Create Contact List ✕

[← BACK](#)

First row is a header

Map the fields from your imported file (in the first column) to the fields found within your PsychData account (in the second column).

Imported file (2 rows)	PsychData Contact Fields
<p>email <i>lwhitney@eliteresearch.com</i></p>	<div style="border: 1px solid #ccc; padding: 2px;">Email ▾</div>
<p>phone <i>4699241294</i></p>	<div style="border: 1px solid #ccc; padding: 2px;">Phone ▾</div>
<p>firstName <i>Rayne</i></p>	<div style="border: 1px solid #ccc; padding: 2px;">First Name ▾</div>
<p>lastName <i>Whitney</i></p>	<div style="border: 1px solid #ccc; padding: 2px;">Last Name ▾</div>

+ ADD CUSTOM FIELD

CONTINUE

Another popup will appear with a preview of the information for you to double check and the button to create your contacts will display the number of contacts in the list, “Create # Contacts.” Once you’ve confirmed the information, click the button.

Create Contact List ✕

[← BACK](#)

4 contacts [CLEAR](#)

Email	Phone	First Name	Last Name	Errors ↓	Actions
a.asher@gmail.com		Able	Asher		EDIT DELETE
b.bailey@gmail.com		Brandon	Bailey		EDIT DELETE
c.carlisle@gmail.com		Christian	Carlisle		EDIT DELETE
d.davidson@gmail.com		Dean	Davidson		EDIT DELETE

Rows per page: 100 ▾ 1-4 of 4 < >

+ ADD CUSTOM FIELD

CREATE 4 CONTACTS









Your list has now been uploaded. You will be redirect to a page that displays all of the contacts you just uploaded.

← BACK TO CONTACT LISTS

Test Names

4 total · 0 unsubscribed · 0 bounced · 0 complaints · 0 duplicates

+ IMPORT EXPORT + ADD CONTACT

<input type="checkbox"/>	ID	NAME	EMAIL	PHONE	ACTIONS
<input type="checkbox"/>	891284	Dean Davidson	d.davidson@gmail.com		 
<input type="checkbox"/>	891283	Christian Carlisle	c.carlisle@gmail.com		 
<input type="checkbox"/>	891282	Brandon Bailey	b.bailey@gmail.com		 
<input type="checkbox"/>	891281	Able Asher	a.asher@gmail.com		 


Step 5b: Enter Contacts Manually (Optional)

If you prefer to enter your list manually, enter your desired name in the “List Name” field and click “Submit”

Create Contact List

List Name *
Test Names

Import Contacts From File

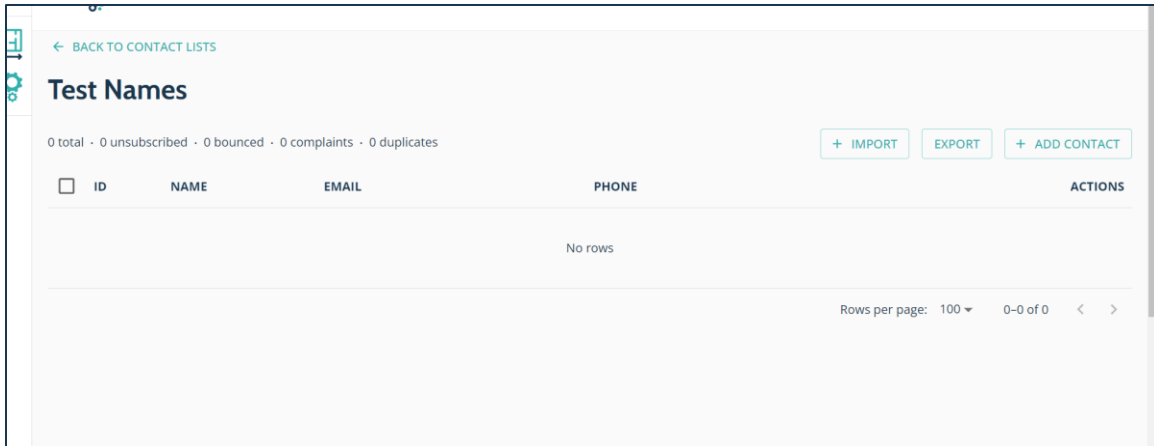


SELECT CSV FILE

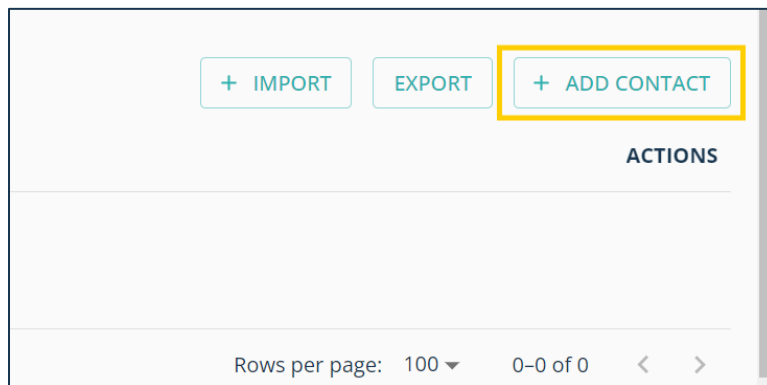
EXPORT TEMPLATE ↓

SUBMIT

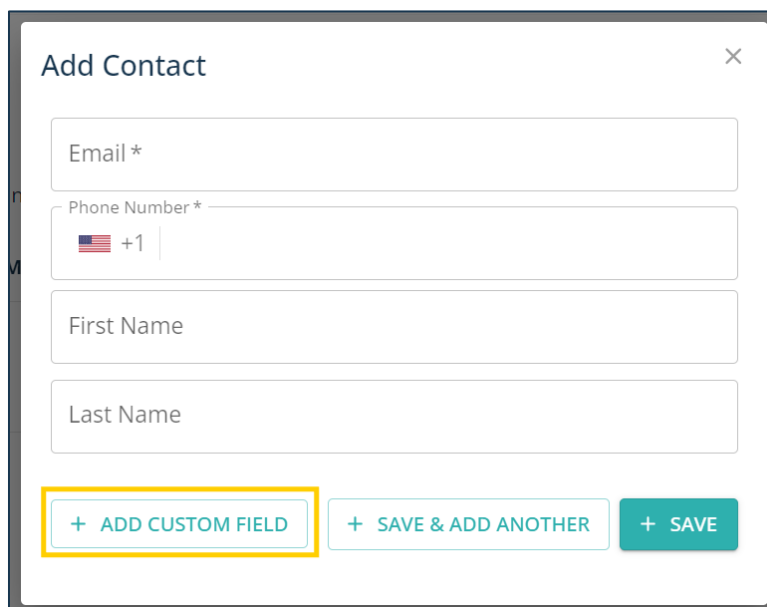
This will take you to the corresponding page for your list, pictured below.



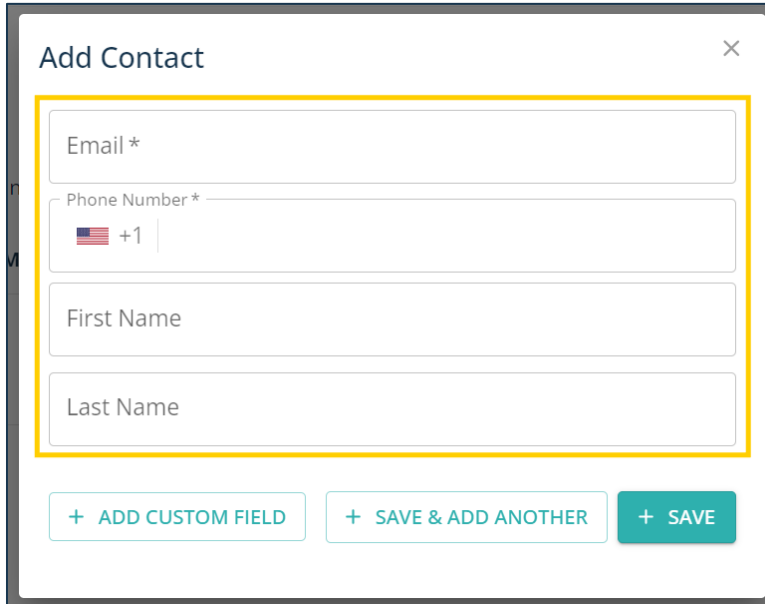
Click “Add Contact.”



A popup will appear with fields for you to enter your contacts. If there are additional fields that are not included, you can use the “Add Custom Field” button to insert whatever field you need. It is best to add additional fields before you’ve entered your contacts.



If there are no additional fields needed, enter the individual contacts into the fields.

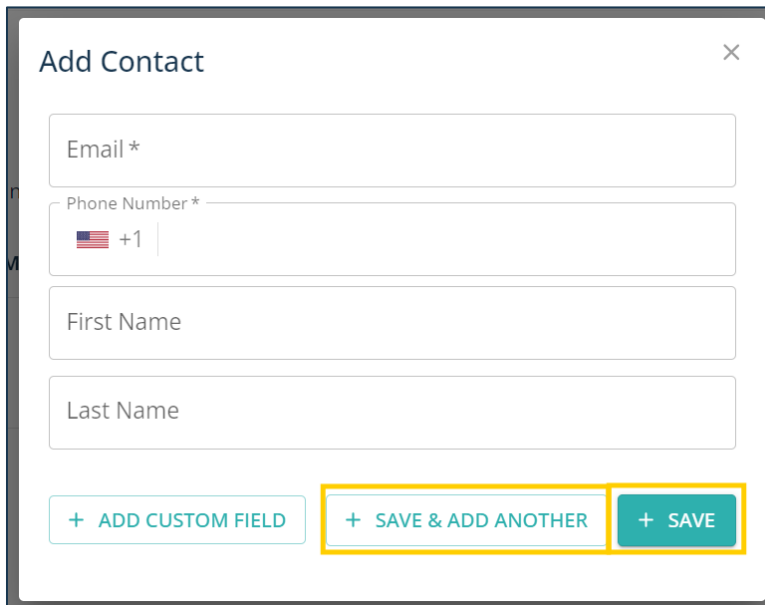


The screenshot shows a modal window titled "Add Contact" with a close button (X) in the top right corner. The form contains four input fields: "Email *", "Phone Number *" (with a dropdown menu showing a US flag and "+1"), "First Name", and "Last Name". A yellow rectangular border highlights these four input fields. At the bottom of the form, there are three buttons: "+ ADD CUSTOM FIELD", "+ SAVE & ADD ANOTHER", and "+ SAVE".

There are two buttons that you can click to save each individual contact.

If you have another contact to enter after this one, click "Save & Add Another."

If it is the last contact in your list, click "Save."



This screenshot is identical to the one above, showing the "Add Contact" form. However, a yellow rectangular border highlights the two buttons at the bottom: "+ SAVE & ADD ANOTHER" and "+ SAVE".