



# Contact Builder Web App

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## Introductory Webinar

May 29, 2013



U.S. Department of Transportation  
Federal Transit Administration

# Agenda

- High-level product overview
- Questions

# Release Date

Contact Builder will be available in the National RTAP Cloud on Monday, June 3, 2013

# National RTAP in the Cloud

The screenshot displays the user interface for 'National RTAP in the Cloud'. At the top, a banner features the title 'National RTAP in the Cloud' in large blue letters, accompanied by icons for 'Peer to Peer' (a computer monitor), a 'Calendar' showing '12', a smartphone, a stack of money, and a lightbulb. Below the banner are the logos for 'National RTAP' and 'FTA Federal Transit Administration'. A navigation bar includes links for 'My Account', 'Support Center', 'Forums', 'National RTAP.org', and 'Logout'.

On the left side, a sidebar menu is visible. It starts with a 'Welcome: Shannon Greenwell (Logout)' message. Below this is a 'Web Apps' section. The 'Contact Builder' app is highlighted with a red arrow. The 'Contact Builder' menu includes the following items:

- Dashboard
- Create Message
- Contacts
- Contact Lists
- Templates
- Contact list Sign Up Code
- Featured Message Code
- Twitter Settings
- Admin Dashboard

In the center of the page, a purple 'Welcome...' box contains the following text:

Welcome...  
to National RTAP in the Cloud. Along the left side you will see the various web application that you have access to. Once you click on a web app, you will see the features for that app. If you have any questions, please contact [support@nationalrtap.org](mailto:support@nationalrtap.org)

# Features

- User-friendly administrative interface
- Create message for email and twitter
- Manage contacts
- Manage contact lists
- Create and share templates
- User can easily subscribe and unsubscribe

# Admin - Dashboard

- View sent messages
- Tag messages as featured
- Archive messages
- View message stats
- Copy/Clone messages
- Preview messages
- Delete messages

# Admin - Dashboard

Four administrative action buttons:

-  Create Message
-  Email Templates
-  Support Center
-  Forum

## Welcome to the Contact Builder

National RTAP Contact Builder is a web-based application that allows users to sign up to receive your email messages based on various contact list that you create. Contact Builder administrators can create contact list, add or upload users into contacts, create custom email templates and send messages from your web...

Before you begin we recommend that you watch the instructional videos (which can be found in the Support Center) and the icons below). These resources will help you create and send messages with the Contact Builder. If you need assistance along the way...

Message Title	Date	Featured	Archive	Status	Stats	Copy	Preview	Delete
Conference Invitation March 19, 2013	03/19/2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sent				
Special Announcement from your Service Provider March 19, 2013	03/19/2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sent				

# Admin – Send Message

- Select the individual or contact list(s) you would like to receive the message
- Create your message (select template or send a basic message and/or send via twitter)
- Add documents and/or images to the message
- Send a test message to yourself or a colleague



# Admin – Send Message

## Step 1 of 3

Use the drop down menu to select

By Contact List

Select the contact list(s) to which

<input type="checkbox"/> Select All	Contact List
<input type="checkbox"/>	eNews
<input type="checkbox"/>	New Product Upd
<input type="checkbox"/>	Webinar Annouce

## Step 2 of 3

Use the following fields to create the content of your message.

Message Title

Join Us

Subject

Webinar

Select Template

Postcard

Please enclose your link in #### at start and end of the link so that sy  
Example: ####www.msn.com####



## Step 3 of 3

If you are satisfied with your message, click 'Send Message.' If you would like to make changes, click the 'Back' button.

 Back

Preview 

Send Message 



# Admin – Manage Contacts

- Three different ways to add a contact/list of contacts:
  - Cut and paste a list- good if you have a list of email addresses being added to the same contact list
  - Type in a single contact- good if you are adding multiple contacts to different lists
  - Upload a list from an excel file- good if you have many contacts being added to the same contact list
- Edit a contact in one place and the change appears in every contact list

# Admin – Manage Contacts

Create, edit and delete your contact lists in this section. Click on the hyperlinks in the "Contacts" column to view the details of each list. The number in the "Contacts" column is the total number of individuals in each list.

Contact List Name

Add 

Category	Contacts	Edit	Delete
eNews	<a href="#">14</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
New Product Updates	<a href="#">3</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Webinar Annoucements	<a href="#">3</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Training Classes	<a href="#">1</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
RTAP News	<a href="#">5</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Federal News	<a href="#">1</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
All News	<a href="#">1</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Library News	<a href="#">1</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

# Admin – Manage Contact Lists

- Create contact list name (title)
- Add or import contacts into a list
- Remove or Unsubscribe contacts from list
- Edit list name/title
- Delete a list(s)

# Admin – Manage Contact Lists

**View All Contacts** X

**Save**

Subscribed	First Name	Last Name	Email	Org
<input checked="" type="checkbox"/>	Frank	Condon	fcondon@nationalrtap.org	National Rtap
<input checked="" type="checkbox"/>	test	test	info@nationalrtap.org	test
<input checked="" type="checkbox"/>	test	test	raheel.khokhar@gmail.com	test
<input checked="" type="checkbox"/>	Frank	Thurs317	fcondon1@devobal.com	
<input checked="" type="checkbox"/>			fcondon2@devobal.com	
<input checked="" type="checkbox"/>			support@nationalrtap.org	
<input checked="" type="checkbox"/>	Joe	Smith	jmith@mycompany.com	Blue Line Transit
<input checked="" type="checkbox"/>			test2@nationalrtap.org	
<input checked="" type="checkbox"/>			test3@nationalrtap.org	
<input checked="" type="checkbox"/>			test4@nationalrtap.org	
<input checked="" type="checkbox"/>			test5@nationalrtap.org	
<input checked="" type="checkbox"/>			test6@nationalrtap.org	
<input checked="" type="checkbox"/>			test7@nationalrtap.org	
<input checked="" type="checkbox"/>	Amir	hadi	sample_emailer@gmail.com	devobal

<< Take action >> **Action**

# Admin – Create and Share Templates

- Choose from shared templates
- Create your own html templates
- Find html email templates on the web (search “Free Email HTML Templates)
- Share templates with other organizations

# Admin – Create and Share Templates

**Templates**

Template name	Active
Basic Block List	True
Advanced Block List	True
Postcard	True
Advanced Postcard	True
Newsletter	True

[Add New Template](#)

**Name:** Basic Block List

**HTML:**

leading One  
Your text here.

leading Two  
Your text here.



# Users – Subscribe and Unsubscribe to Contact Lists

- Users can sign up for various contact lists
- Users can unsubscribe from lists

Place this website code on your public website between the tags <body> </body>. The code will enable the... that allows website visitors to subscribe to your email notifications

Select the required fields a visitor will complete when signing up:

- First name
- Last name
- Organization

Select the contact list(s) that you would like to appear as checked will not show up to your website visitors.

- eNews
- New Product Updates
- Webinar Announcements
- Training Classes
- RTAP News
- Federal News
- All News
- Library News
- Conference Invitation
- Shannon List
- Jess Wallis
- Shannon Test List
- Test Test Test
- Special Announcement
- Special Announcement 2
- Webinar Invitation

Last Name:

Email Address:

Add these contacts to the following list(s):

- eNews
- New Product Updates
- Webinar Announcements
- Training Classes
- RTAP News
- Federal News



# Users – Featured Messages

- Add the iframe code to your website
- Users can view messages you have tagged as “featured”

Place this website code on your public website between the tags. This code will allow your website visitors to search for messages that you have tagged as featured.

Featured Message Code:

```
'<iframe id='iframeOrg'  
src='http://demopro.nationalrtap.org/archivesearch.asp  
x?orgid=a2GSpnDbrul%3d' frameborder='0'  
width='100%' scrolling='no' height='700'>  
    <p>Your browser does not support  
iframes.</p>  
</iframe>  
    <script language='javascript'>
```

Select All

*Note: Please do not modify this code.*

# Users – Featured Messages

Keyword:

Date From:  [Pick date](#)

Date To:  [Pick date](#)

Message type:

[Search](#)

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## Search Archived Messages

## Recent Messages

- [test](#)
- [Contact Builder Test](#)
- [Spring Conference Inv ...](#)
- [Special Announcement ...](#)
- [Shannon Test Email](#)
- [Testing website link](#)
- [Board Meeting Example](#)

## Message Types

- [eNews](#)
- [New Product Updates](#)
- [Webinar Announcements](#)
- [Training Classes](#)
- [RTAP News](#)
- [Federal News](#)

## Sign-Up for Messages !

[Sign up](#)

## Share It !

 [SHARE](#)    ...

# Questions



# Workshop Webinar

The workshop webinar will give step-by-step instructions on how to use each feature in the Contact Builder web app

June 12, 2013 1-2 pm Eastern

# Contact Us

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