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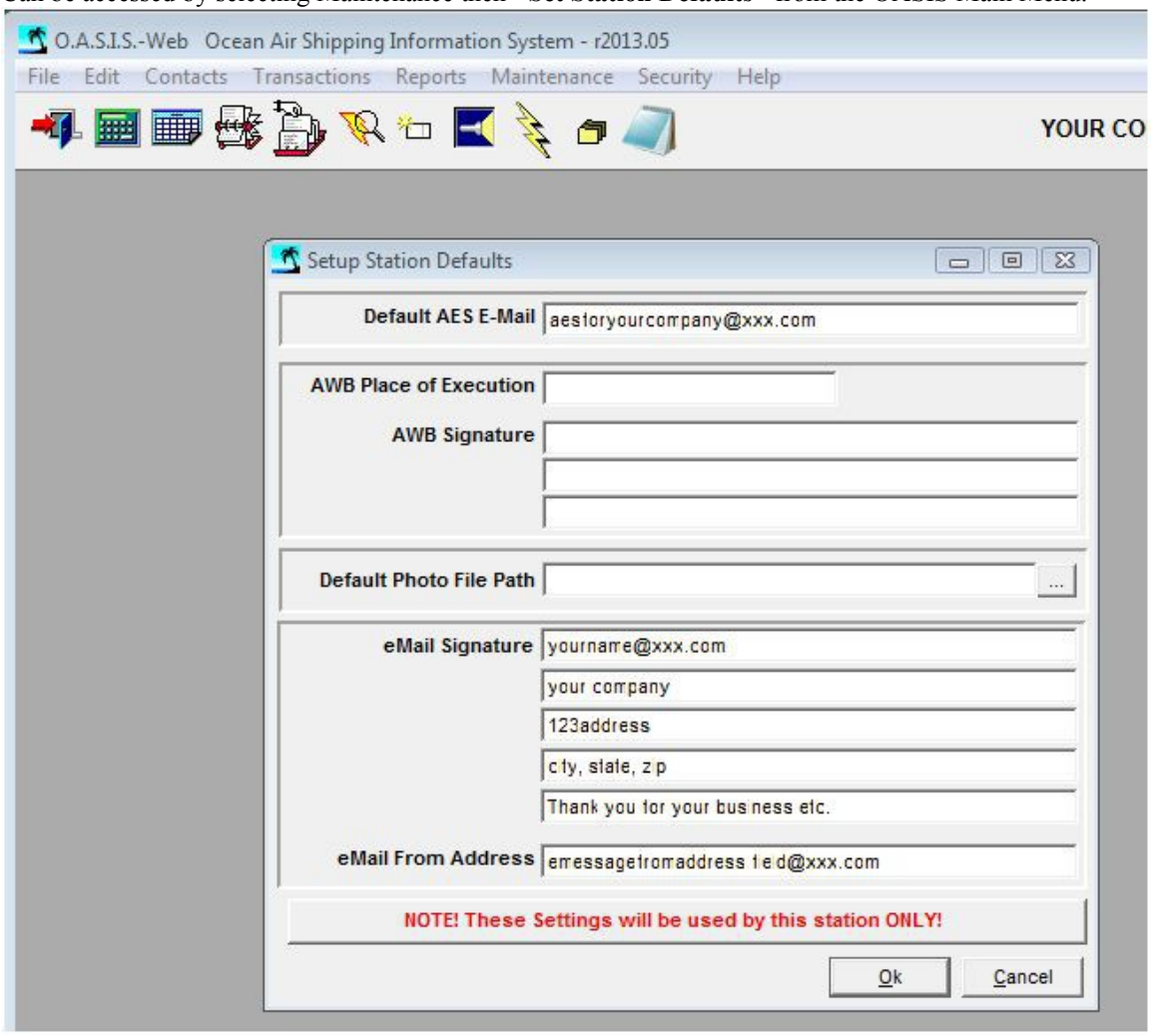
OASIS EMESSAGE

Last Revision Date: May 28, 2013
Last Update: November 5, 2003

Please note the following enhancements:

Signature Fields – Emessaging

Can be accessed by selecting Maintenance then <**Set Station Defaults**> from the OASIS Main Menu.

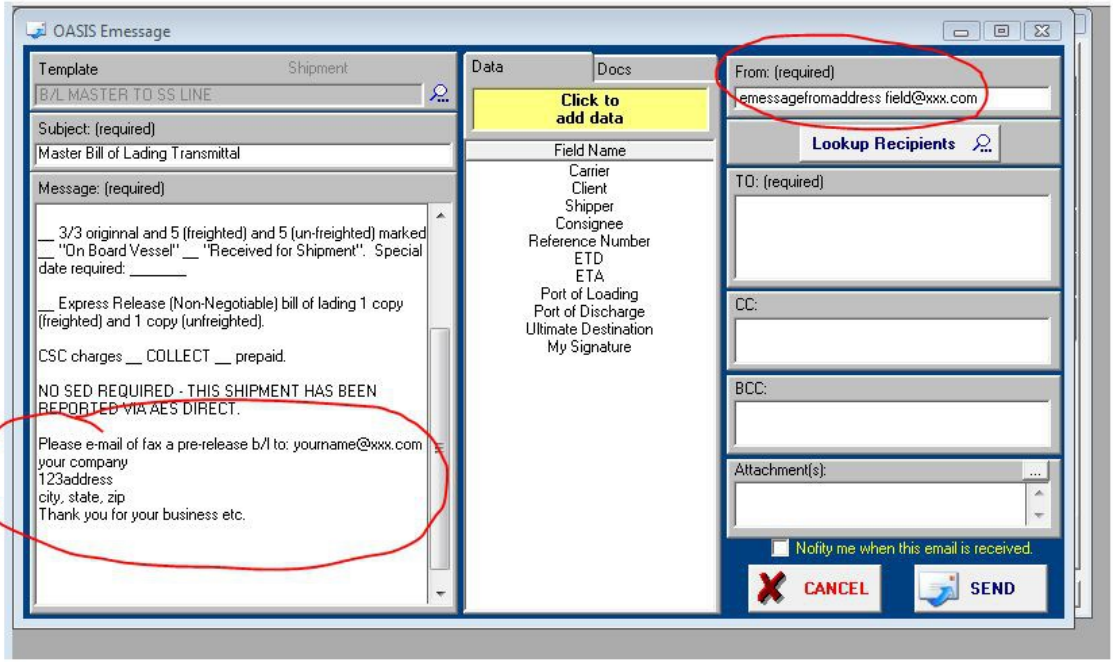


Email Signature

Can be personalized by entering your company particulars such as Company Name, Address fields and other closing remarks such "Thank You for your business". The Email Signature data will automatically be included in the message body of the eMessage being sent.

Email From Address

A default From email address must be edited by accessing this field and editing the email address you wish to use for all OASIS eMessages. Prior to this enhancement your email address had to be entered manually each and every time.



Processing

As of June, 2013 -the processing steps required in executing an eMessage have been reduced from 7-10 to just 2 .

Control Templates

Request	Solution
Emessage 1) Add Default Template (by Template Name) to each template type (Shipment/Inbound/Call/Warehouse) which will be automatically selected when the eMessage is initiated.	Added new field to eMessage to allow a template to be designated the 'Default' for Type selected. Added Default eMessage template selection to Client record for each transaction type
Added Template Setting which allows selection of parties (Client, Shipper, Consignee, Forwarder, Notify Party) to be included for eMessage Notifications.	Added Distribution Fields to eMessage Templates allows selection of TO, CC, or BCC for available parties

Automatically Load Default Template according to Client, then load any Active eMessage Contacts from any of the selected parties into the proper TO,CC, and BCC fields whenever the eMessage button is clicked.	Recoded eMessage Send routine so it will first check the CLIENT record for Template DEFAULT, then if none load the System DEFAULT for that transaction type. Then use the Distribution list on the Template to load the TO, CC, and BCC using the eMail enabled contacts from each party.

EMESSAGE FUNCTIONALITY

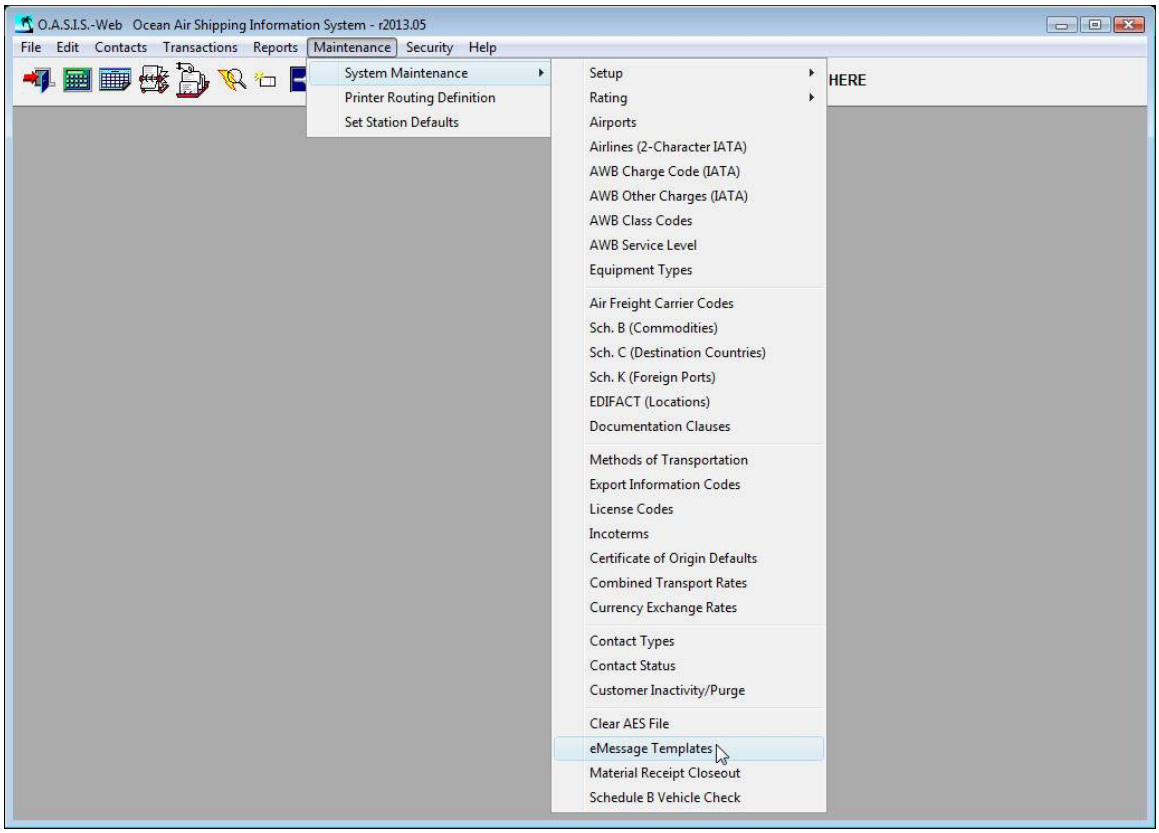
OASIS eMessage allows the OASIS site to set up Email notifications, based on "system" events such as RFQ 'Request For Quotations', Booking Confirmations, Pre-Shipment Advices and other events, which have been enabled within the OASIS environment. Additionally, eMessage allows for the automatic generation of OASIS documents in Adobe PDF electronic form which may be attached with your eMessage distributed to clients, consignees, trading parties or other related individuals.

Several improvements have been made to OASIS eMessage based on user suggestions. This updated document details these functions.

Default Email System Setup

Emessages can be setup with a default or customized individually for specific clients. This section describes the default setup.

In order to setup the **eMessage** system, access <System Maintenance> from the OASIS Main Menu and then the **eMessage** option as presented in this screen.



Email Message Templates

Initially, a few sample Messages will be supplied with OASIS. All system tabs and buttons like <Insert>, <Change>, <Delete> and system functions are organized to seamlessly function exactly as in other OASIS system areas or modules.

Template Type

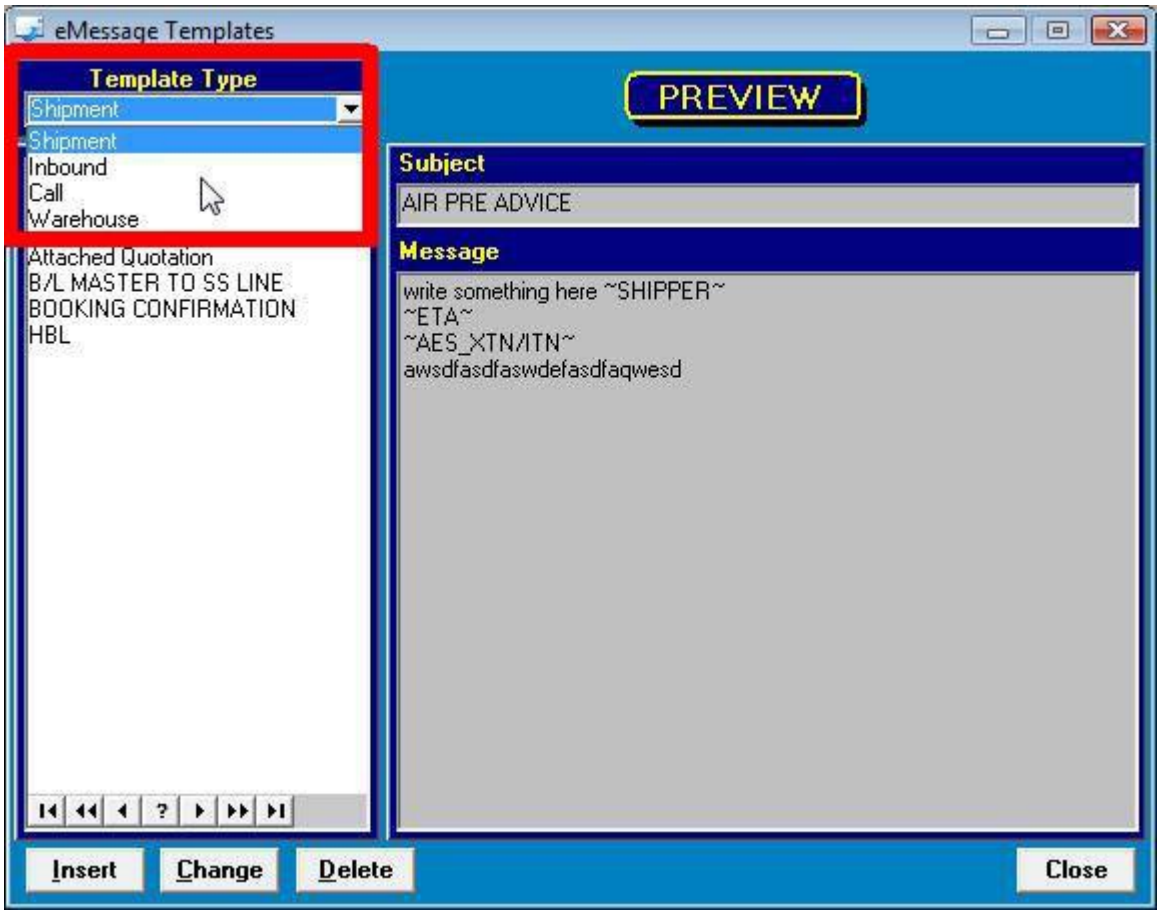
The template types available are:

- Shipment (Air / Ocean)
- Inbound

- Call
- Warehouse

Selecting a TEMPLATE TYPE from the Drop Down Arrow allows the operator to select a specific Template Type. The predefined Subject and corresponding Message are displayed in the appropriate box areas.

You may design / Edit the wording to suit your specific opearational needs in the various Template Types of messages for specific OASIS modules.



Insert

Allows the operator to **INS**ert a new Message Title and thus create additional OASIS email notification system events.

Change

Allows the operator to Change or modify a previously OASIS email notification system event.

Delete

As the name implies, deletes a previously existing email notification system event.

Message Title

The name of the OASIS email system event.

Subject

Is the Subject line, which will be displayed to the recipient of the OASIS email system event.

Editing OASIS eMessages

Once you either <INSert> or <Change> an **eMessage** a screen similar to this one will be presented. You will note that the screen has several areas.

Added new field to eMessage to allow a template to be designated the 'Default' for Type selected. Added colorization to identify DEFAULT Template when browsing. Also added error checking so there can only be one DEFAULT for each Type.

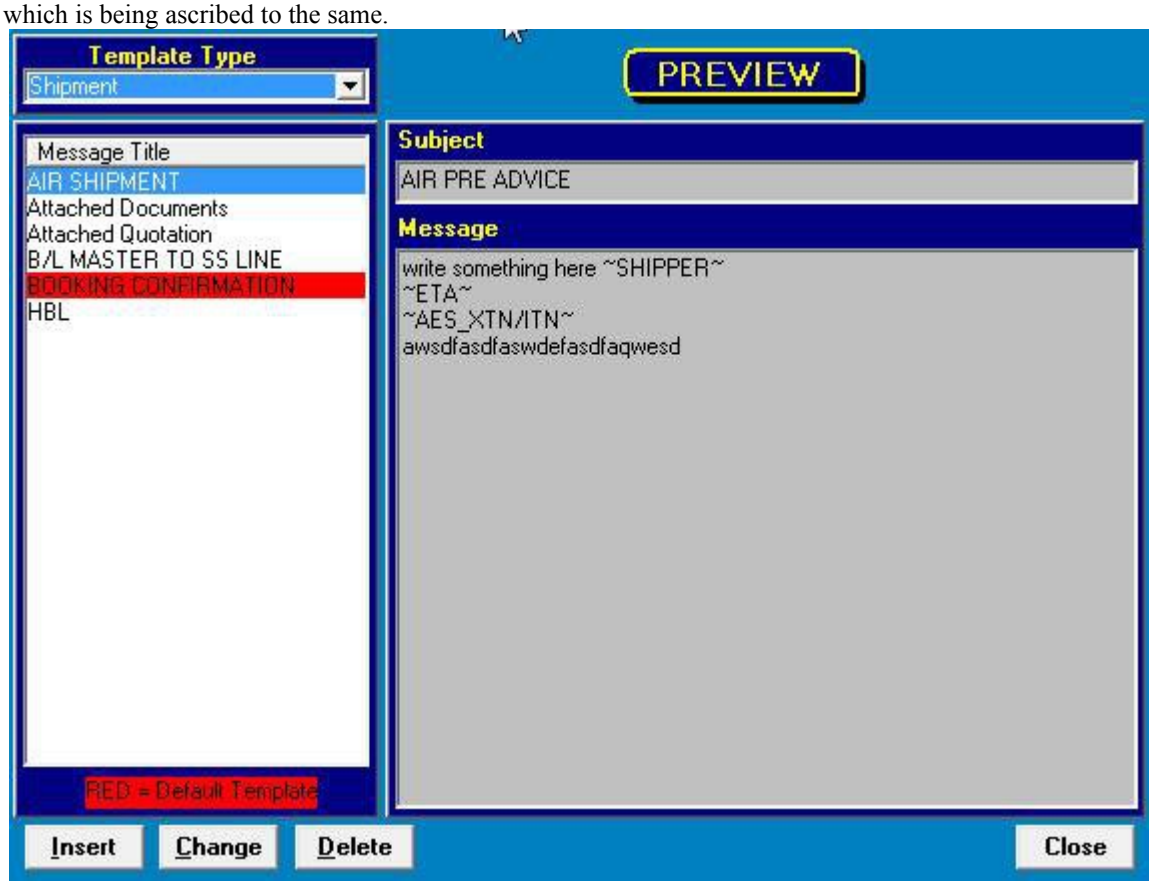
Template Type

Selecting this option allows the user to select the type of transaction the eMessage will be for. These include:

- Shipment
- Inbound
- Call Record
- Warehousing

Message Title

Is the Title of your OASIS **eMessage**. This title may be modified because OASIS actually assigns a numeric sequence to each message created and thus is not dependent on the message title. You should endeavour to utilize titles that make sense to the operator. In other words, name the title to the function, which is being ascribed to the same.



Subject:

Is the subject title line that will be displayed on the recipients email message. Please note that you may

utilize text that you create as well as OASIS system ~Variables~ which are picked from the list presented on the right hand side of the screen as well as from the "Field Name" section which contain additional OASIS system ~variables~.

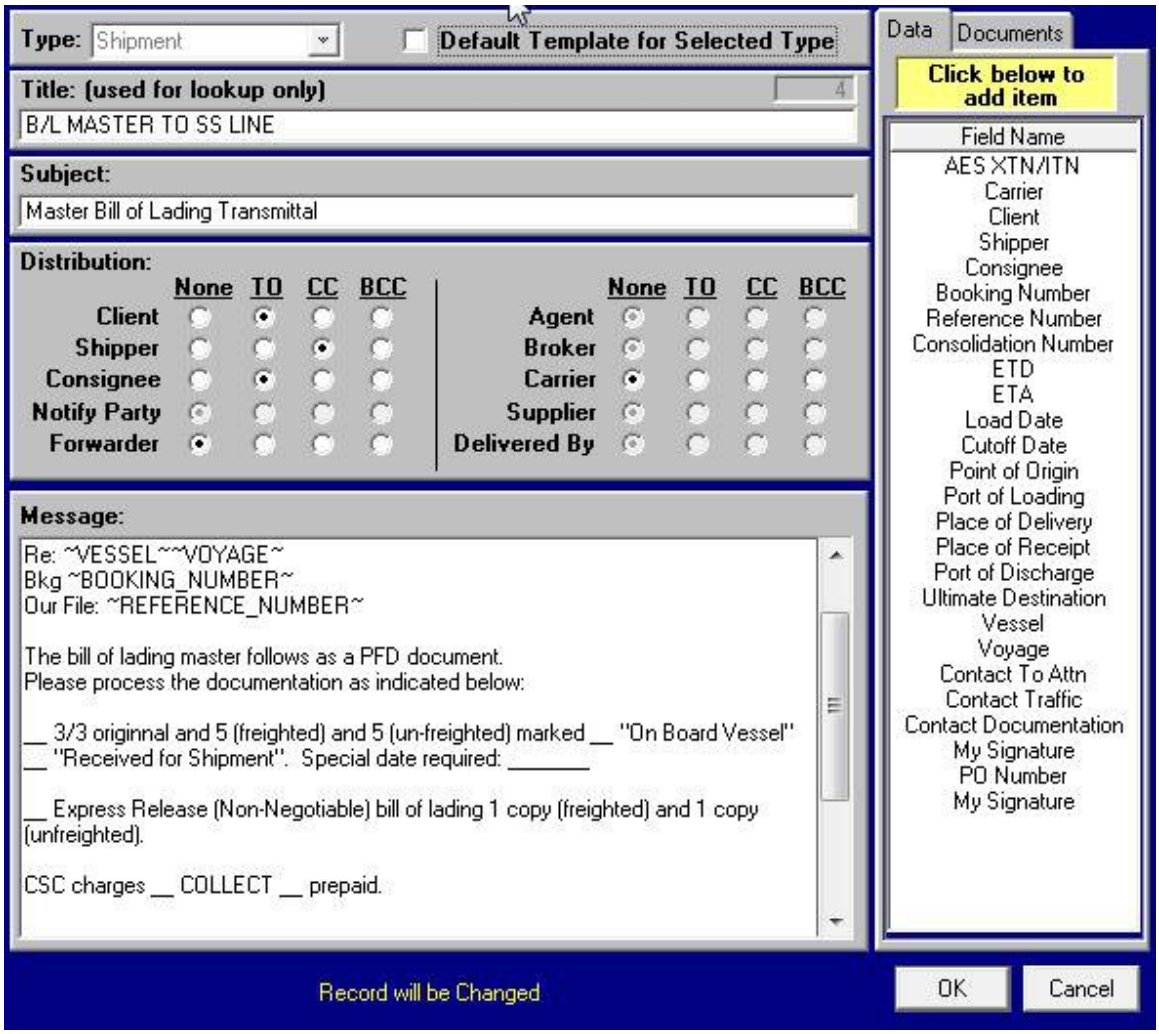
This allows you to create highly customizable messages, which automatically pulls system information from your previously created shipments.

Distribution

You may select to which parties to the transaction you wish to automatically send an eMessage.
For example selecting the CLIENT TO field would designate that the CLIENT would received an eMessage. If you wish the CONSIGNEE to also received an eMessage you would also tag that party. Note that you can designate if they are the PRIMARY {TO} or if the message is a CC {Copy} or BCC {Blind Copy}

Message

The actual text or message that will be delivered to the recipient. Keep in mind that you may edit messages including OASIS system ~variables~ which are picked from the Data tab on the right hand side of the screen and placed specifically in the text area you select by placing your cursor were you wish to drop the ~variable~ in. This allow you to create highly effective and informative recipient messages.

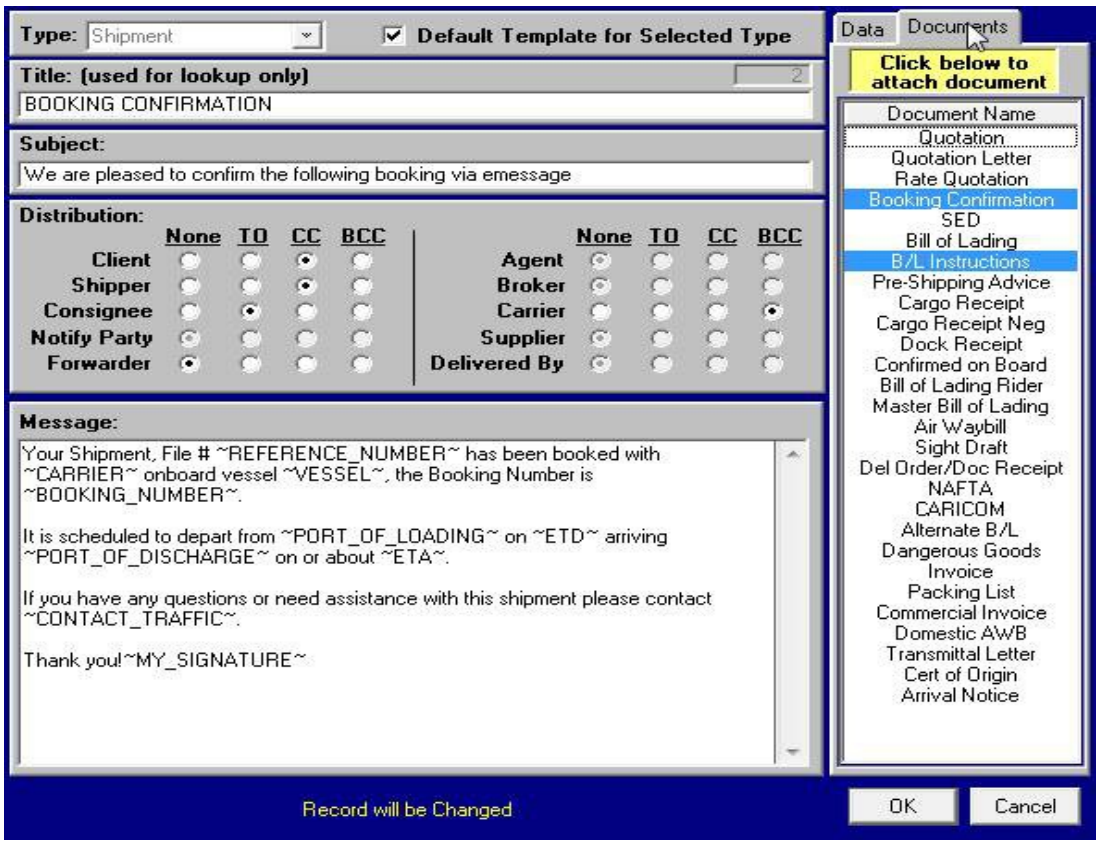


Data

The Data tab includes many OASIS system ~variables~ not limited to:

- Carrier
- Client
- Shipper
- Consignee
- Booking#
- Reference#
- Consolidation#
- ETD
- ETA
- Load Date
- Cutoff Date

And will vary, depending on which Data set you are working with. For example if you are working with the Warehouse module or Inbound module Data set, variables utilized in those modules will be presented from which you may choose.



Note that if an OASIS system ~variable~ has been defined within the body of one of your **EMessage**s but the actual data does not exist in the OASIS shipment referenced, that the **EMessage** will only display the OASIS system ~variable~ i.e.= ~**N/A**~ instead of something like MAERSK312-4325. In order to correct this, you must access the OASIS transaction and enter "valid" data into the corresponding OASIS system ~variable~ field.

Documents (PDF)

We have been successful in generating and implementing OASIS PDF electronic documents within the OASIS environment. PDF documents may be added to your e-mail eMessage by selecting the Docs button and highlighting one or more OASIS generated documents.

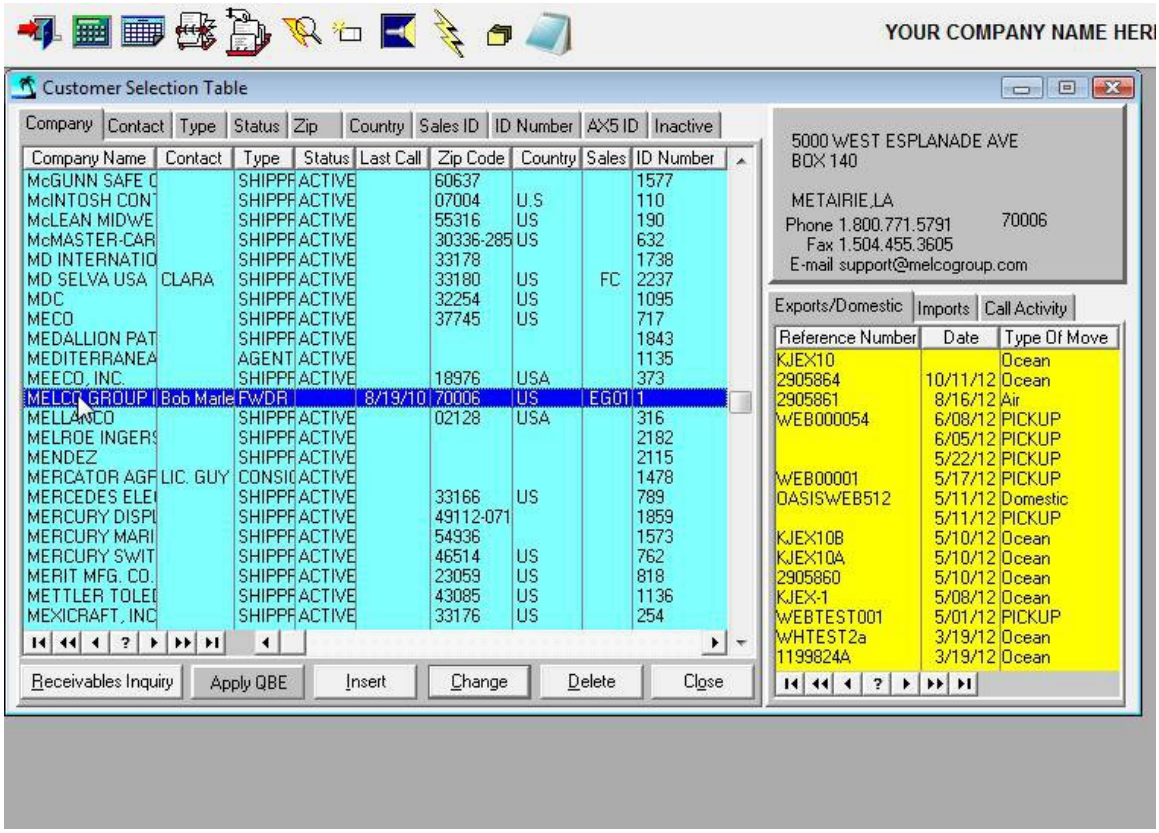
Depending on the TYPE {of shipment} selected the Document tab will display available system documents.. Only "completed" documents will be available for selection. Tagging selected documents which will be highlighted in{**Blue**} and clicking on OK will save your selections and will automatically be delivered with subsequent eMessages when processed.

Specific CUSTOMER Email System Setup.

In the event that your operations require a specific OASIS eMessage customized to an individual Company this is performed at the ROLODEX customer level. This also allows you to setup individual Customer eMessaging functions by-passing the eMessage Templates. This can be done for example if you have specific requirement not matching the requirements defined through setting up the system templates. For example a customized distribution list or specific OASIS generated document.

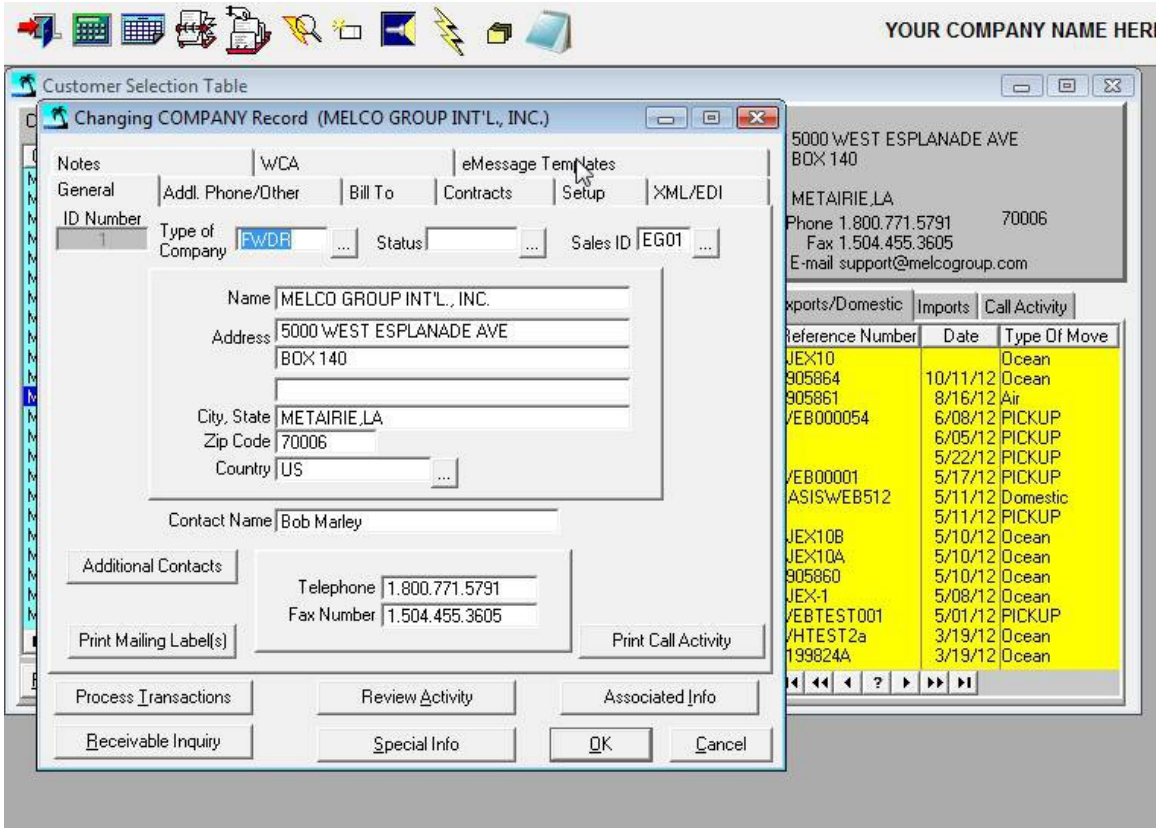
Rolodex

From the OASIS Rolodex select the appropriate Customer. Then press the CHANGE button..



eMessage Templates (Rolodex level)

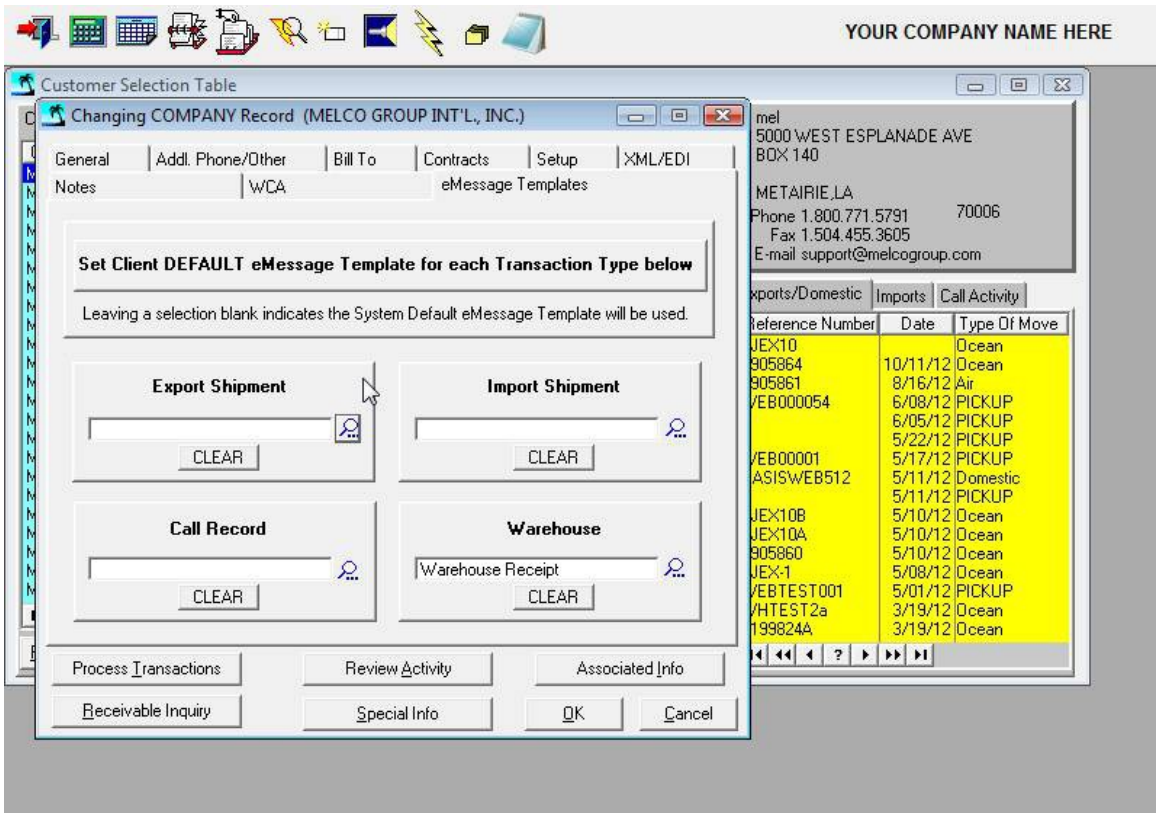
Click on the eMessage Template button. This will display several options. Options are clearly displayed on the screen.



Templates

You may select one or more of the available templates. For example this client may require a different distribution list than the Generic (default) setup accomplished through MAINTENANCE => System Maintenance setup. By accessing for example the WAREHOUSE template the message text, ~variables~, Distribution list (**who gets the eMessage i.e.: Shipper, Client, Consignee, etc**) can be defined overwritting the standard templates utilized system wide.

CLEAR buttons on Customer record eMessage template overrides so they can be removed if desired.


YOUR COMPANY NAME HERE
Customer Selection Table
Changing COMPANY Record (MELCO GROUP INT'L, INC.)
General
Addl. Phone/Other
Bill To
Contracts
Setup
XML/EDI
Notes
WCA
eMessage Templates
Set Client DEFAULT eMessage Template for each Transaction Type below
Leaving a selection blank indicates the System Default eMessage Template will be used.
Export Shipment
CLEAR
Import Shipment
CLEAR
Call Record
CLEAR
Warehouse
Warehouse Receipt
CLEAR
Process Transactions
Review Activity
Associated Info
Receivable Inquiry
Special Info
OK
Cancel
mel
5000 WEST ESPLANADE AVE
BOX 140
METAIRIE,LA
Phone 1.800.771.5791
70006
Fax 1.504.455.3605
E-mail support@melcogroup.com
Imports
Call Activity
Reference Number
Date
Type Of Move
JEX10
Ocean
905864
10/11/12
Ocean
905861
8/16/12
Air
/EB000054
6/08/12
PICKUP
6/05/12
PICKUP
5/22/12
PICKUP
/EB00001
5/17/12
PICKUP
ASISWEB512
5/11/12
Domestic
5/11/12
PICKUP
JEX10B
5/10/12
Ocean
JEX10A
5/10/12
Ocean
905860
5/10/12
Ocean
JEX-1
5/08/12
Ocean
/EBTEST001
5/01/12
PICKUP
/HTEST2a
3/19/12
Ocean
199824A
3/19/12
Ocean

EMESSAGE PROCESSING

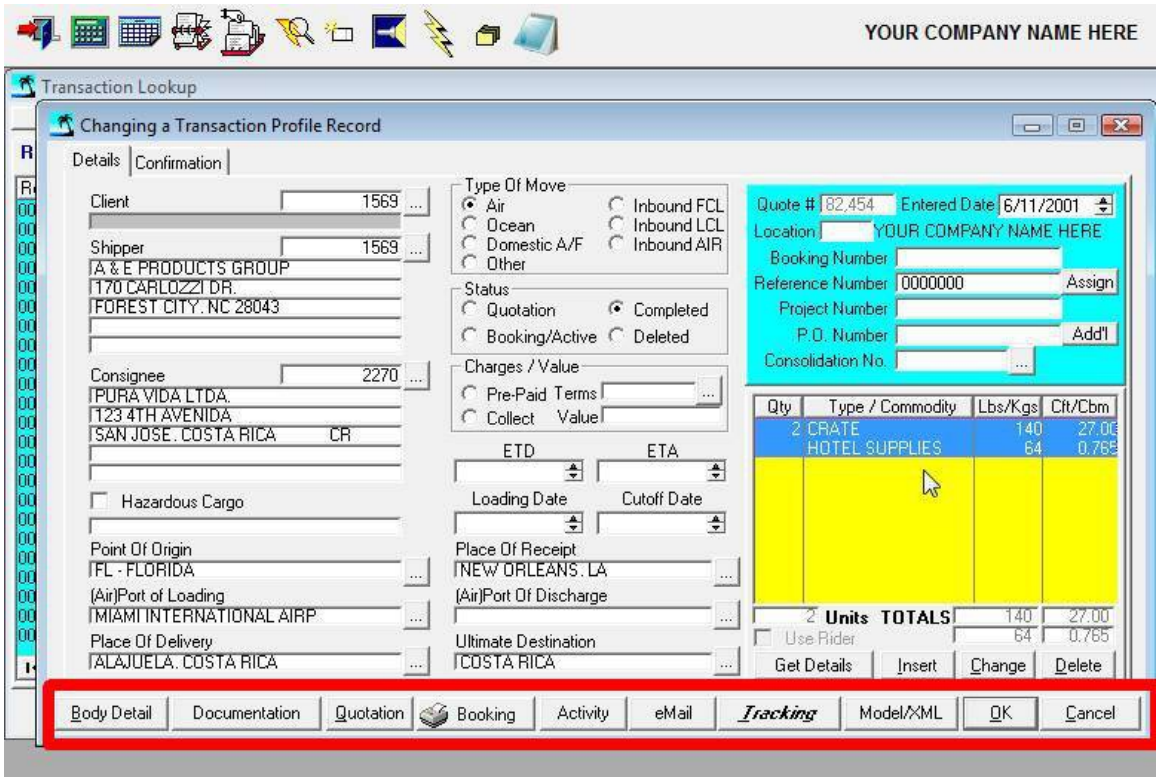
We will describe the steps necessary in order to process a typical OASIS eMessage in this section. **The processing steps required in executing an eMessage have been reduced from 7-10 to just 2**

OASIS Transaction Profile

In order to process an OASIS **eMessage**, you first have to access an existing Quote, Booking or Active shipment from the OASIS <Transactions> Main Menu. The following options are also available brom the Inbound, Warehousing, Call Management Call Record and Ocean / Air modules.

Email Button

Notice the [**Email**] button Pressing this button will display the Main eMessage Processing screen.



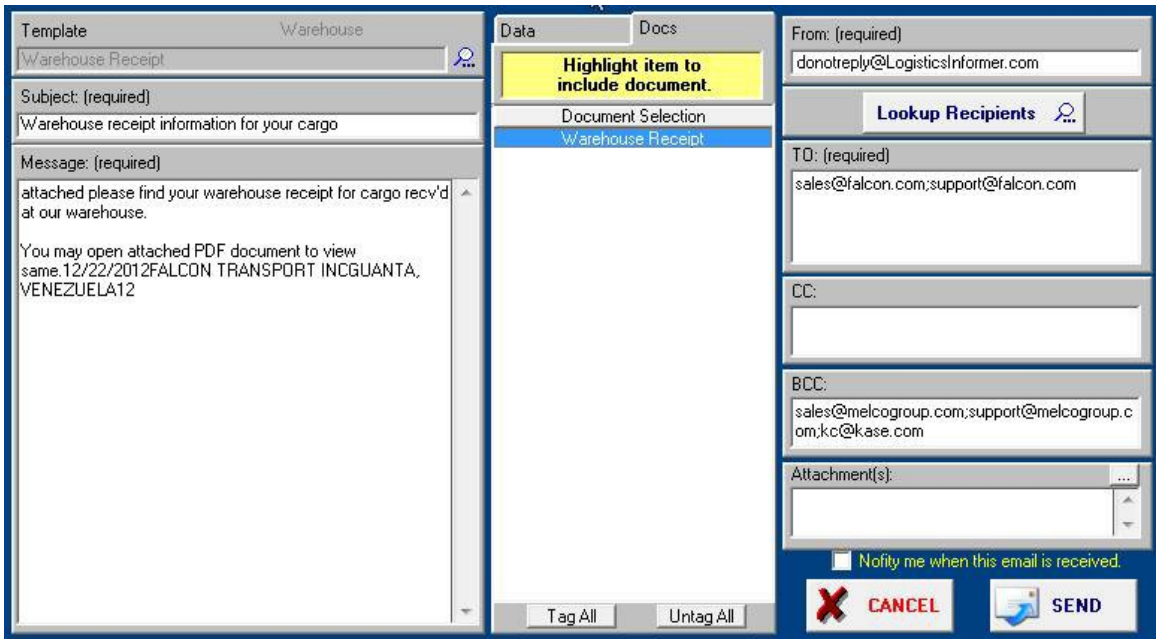
Once you access a shipment, select it and click on the email button, a screen similar to the following one is presented. That's basically it unless you wish to attach a specific document such as a Spreadsheet or document that has been scanned and saved in your system. This would be accomplished by selecting the ellipsis button in the ATTACHMENT(s) box and tagging it.

- Pressing the **CANCEL** button would abort the operation.
- Pressing the **SEND** button would execute the eMessage.

Docs Button

When setting up the eMessage Templates you have an opportunity to define the type of document that needs to be included in the eMessage. If it was defined then no further action is required.

However, if you wish to send an OASIS generated PDF document with your eMessage, then select the Docs button if not previously defined (attached) to the message.



Once you have finished selecting one or multiple OASIS PDF documents, they will be attached to your eMessage and delivered to appropriate recipients.

From (required) field

See OASIS.INI for setup. This is automatically inserted.[1]

Lookup Recipients

Automatically defaulted from eMessage Templates.[2]

All <Lookup Recipients> come from the OASIS Rolodex "Additional Contacts" field button. In order to select the To {recipient} you would click on the [Lookup Recipient] button which will display your OASIS Contact list. Then you would enter the first few characters for the appropriate company i.e.: **MEL** would take you to the first **MEL**co Group records as this example screen shows.

Note that there are three columns displayed.

(1) are your OASIS contact company records.
(2) Are the additional contact records which have previously been defined including corresponding email address
(3) Are the field where you are able to process the TO, CC & BCC fields, as required by your communication.

To (required) field

Automatically inserts the (2) field selected.

CC: Field

Automatically inserts the (2) field selected.

BCC: Field

Automatically inserts the (2) field selected.

1 Refer to OASIS.INI setup
2 Refer to DISTRIBUTION section

Post Processing

Notice that once you have selected the appropriate (2) Selected Contacts into the appropriate TO, CC & BCC fields as appropriate for your communication that these contacts are removed from your (2) Select Contact column. This has been designed in order to prevent the "same" contact to be duplicated in your communication.

OASIS Emessage Setup

From the OASIS Main Menu select Maintenance => System Maintenance => Setup => General Information. Select your Copamny or Branch for OASIS Enterprise systems. Then select the eMail Tab.

- Enter your SMTP Address
- SMTP port ususlly 25 but could be different port.
- SMTP Login
- SMTP Password
- to test and make sure all is ok with above particulars enter a test email address
- Send Test.
- You should received a return eMessage confirming that your setup is correct.
- Otherwise check with your email provider to get above information.

CLIENT NOTE:

We appreciate your comments regarding eMessage and appreciate suggestions or comments delivered to mailto:support@melcogroup.com?subject=**EMessage**

Sincerely,
Melco Group Int., Inc.
http://melcogroup.com/contact.html
support@melcogroup.com
http://www.melcogroup.com