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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.

O.A.S.I.S.-Web Ocean Air Shipping Information System - r2013.05

File Edit Contacts Transactions Reports Maintenance Security Help

YOUR CO

Setup Station Defaults

Default AES E-Mail: aestoryourcompany@xxx.com

AWB Place of Execution: [ ]

AWB Signature: [ ]

Default Photo File Path: [ ]

eMail Signature: yourname@xxx.com  
your company  
123address  
city, state, z p  
Thank you for your bus ness etc.

eMail From Address: emessagefromaddress f e d@xxx.com

**NOTE! These Settings will be used by this station ONLY!**

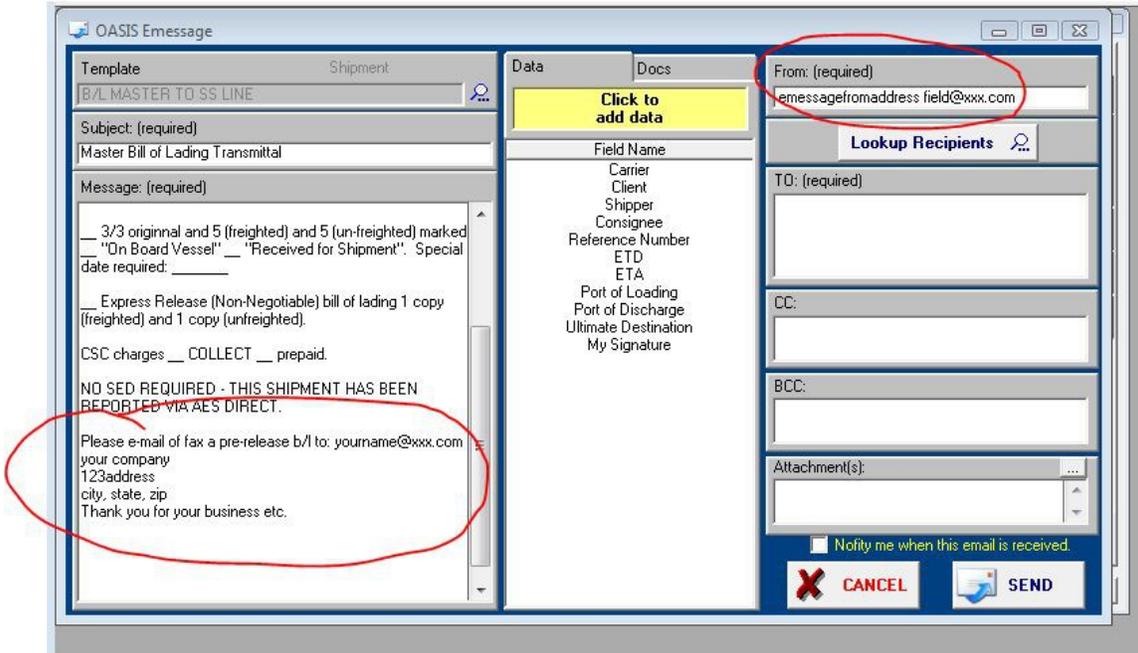
Ok Cancel

### ***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
<p>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.</p>	<p>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</p>
<p>Added Template Setting which allows selection of parties (Client, Shipper, Consignee, Forwarder, Notify Party) to be included for eMessage Notifications.</p>	<p>Added Distribution Fields to eMessage Templates allows selection of TO, CC, or BCC for available parties</p>

<p>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.</p>	<p>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.</p>
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## EMESSAGE FUNCTIONALITY

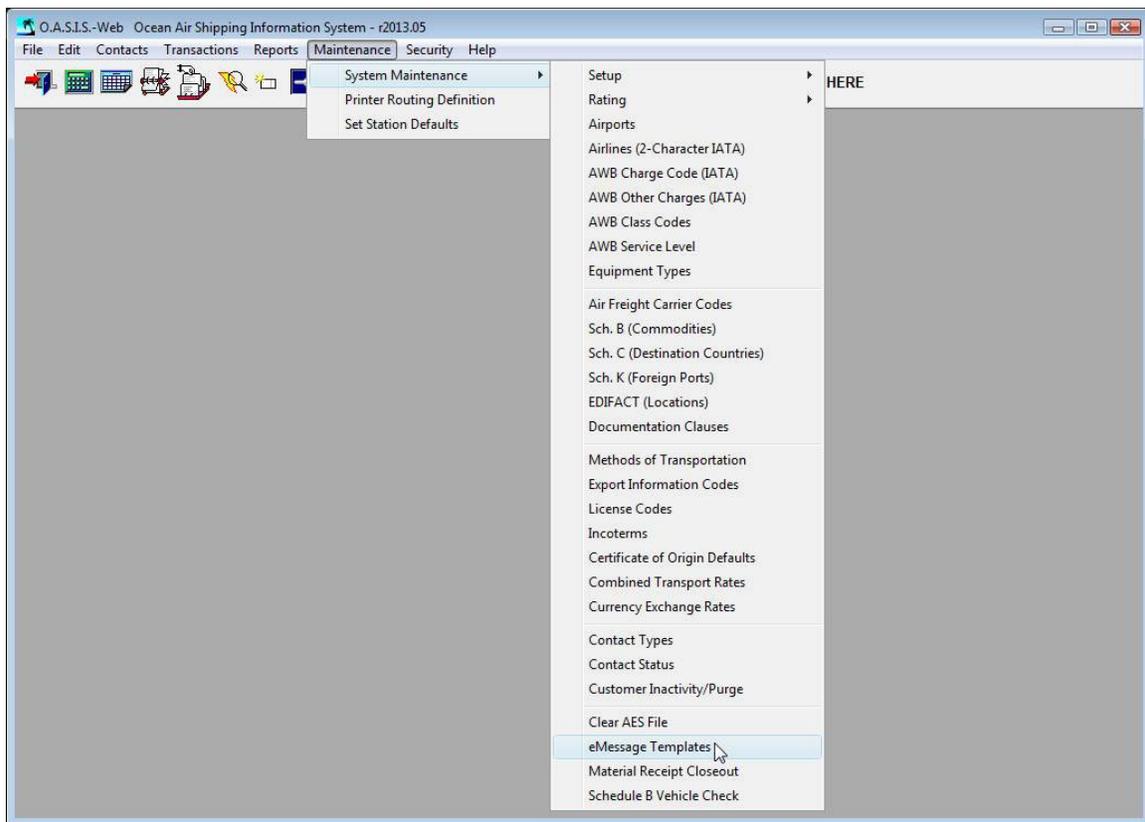
OASIS eMessage allows the OASIS site to set up Email notifications, based on “system” events such as RFQ ‘Request For Quotations’, Booking Confirmations, Pre-Shipment Advices and other events, which have been enabled within the OASIS environment. Additionally, eMessage allows for the automatic generation 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

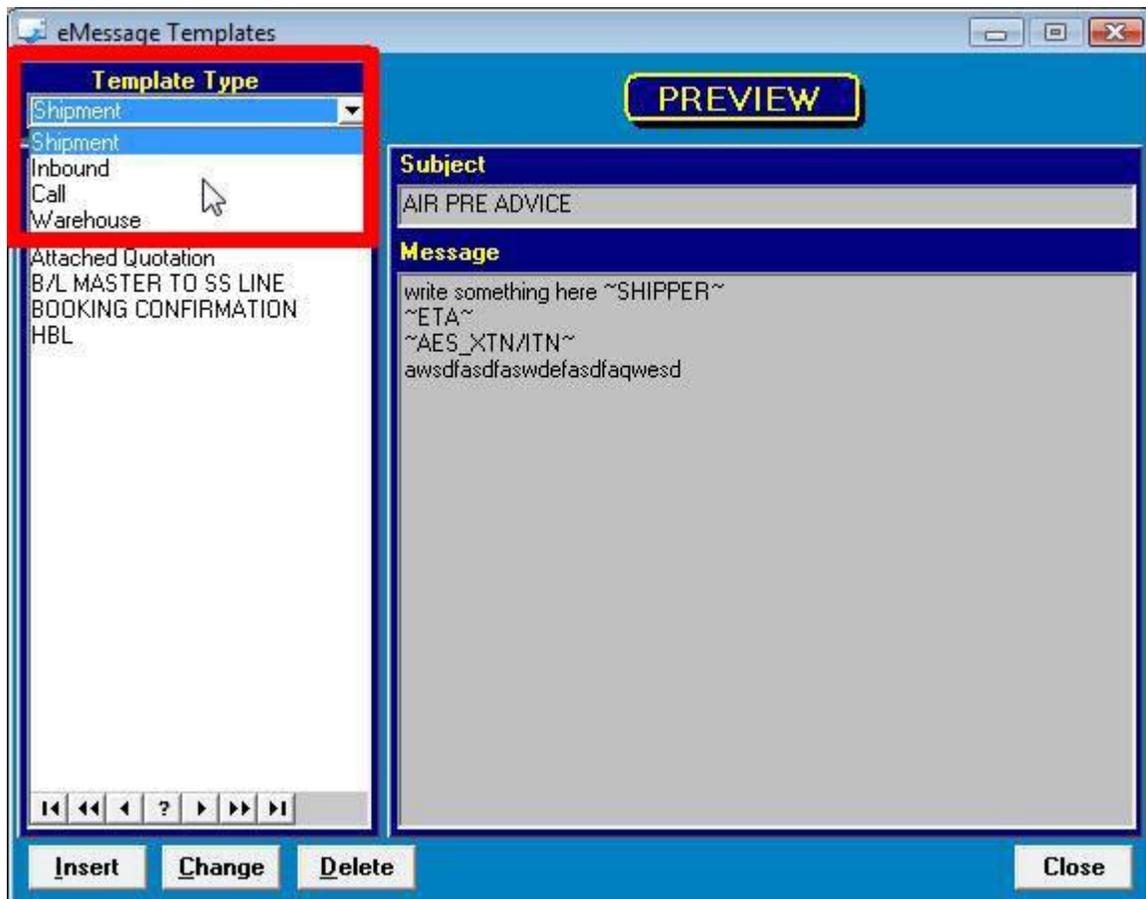
The template types available are:

- 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 operational 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.

The screenshot shows a software interface for editing eMessages. At the top left, there is a dropdown menu labeled 'Template Type' with 'Shipment' selected. To its right is a yellow 'PREVIEW' button. Below the dropdown is a list of message templates: 'Message Title', 'AIR SHIPMENT', 'Attached Documents', 'Attached Quotation', 'B/L MASTER TO SS LINE', 'BOOKING CONFIRMATION' (highlighted in red), and 'HBL'. A red bar at the bottom of this list indicates 'RED = Default Template'. The main editing area is split into two sections: 'Subject' with the text 'AIR PRE ADVICE' and 'Message' with the text 'write something here ~SHIPPER~ ~ETA~ ~AES\_XTN/ITN~ awsdffasdfaswdefasdfaqwesd'. At the bottom of the window are four buttons: 'Insert', 'Change', 'Delete', and 'Close'.

## 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.

**Type:** Shipment  **Default Template for Selected Type**

**Title: (used for lookup only)**  
B/L MASTER TO SS LINE

**Subject:**  
Master Bill of Lading Transmittal

**Distribution:**

	None	TO	CC	BCC		None	TO	CC	BCC
<b>Client</b>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<b>Agent</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Shipper</b>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<b>Broker</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Consignee</b>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<b>Carrier</b>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Notify Party</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<b>Supplier</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Forwarder</b>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<b>Delivered By</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Message:**

Re: ~VESSEL~ ~VOYAGE~  
 Bkg ~BOOKING\_NUMBER~  
 Our File: ~REFERENCE\_NUMBER~

The bill of lading master follows as a PFD document.  
 Please process the documentation as indicated below:

\_\_ 3/3 original and 5 (freighted) and 5 (un-freighted) marked \_\_ "On Board Vessel"  
 \_\_ "Received for Shipment". Special date required: \_\_\_\_\_

\_\_ Express Release (Non-Negotiable) bill of lading 1 copy (freighted) and 1 copy (unfreighted).

CSC charges \_\_ COLLECT \_\_ prepaid.

**Data Documents**

**Click below to add item**

Field Name

- AES XTN/ITN
- Carrier
- Client
- Shipper
- Consignee
- Booking Number
- Reference Number
- Consolidation Number
- ETD
- ETA
- Load Date
- Cutoff Date
- Point of Origin
- Port of Loading
- Place of Delivery
- Place of Receipt
- Port of Discharge
- Ultimate Destination
- Vessel
- Voyage
- Contact To Attn
- Contact Traffic
- Contact Documentation
- My Signature
- PO Number
- My Signature

Record will be Changed

OK Cancel

## 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.

The screenshot shows the 'Data' tab in the OASIS system. The form is for a 'Shipment' type, with the title 'BOOKING CONFIRMATION' and a subject line: 'We are pleased to confirm the following booking via emessage'. The distribution section includes radio buttons for 'None', 'TO', 'CC', and 'BCC' for Client, Shipper, Consignee, Notify Party, Forwarder, Agent, Broker, Carrier, Supplier, and Delivered By. The message body contains a template for a booking confirmation. On the right, a 'Documents' list is visible, with 'Booking Confirmation' and 'B/L Instructions' highlighted. The status bar at the bottom indicates 'Record will be Changed'.

Note that if an OASIS system ~variable~ has been defined within the body of one of your **EMessages** 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.

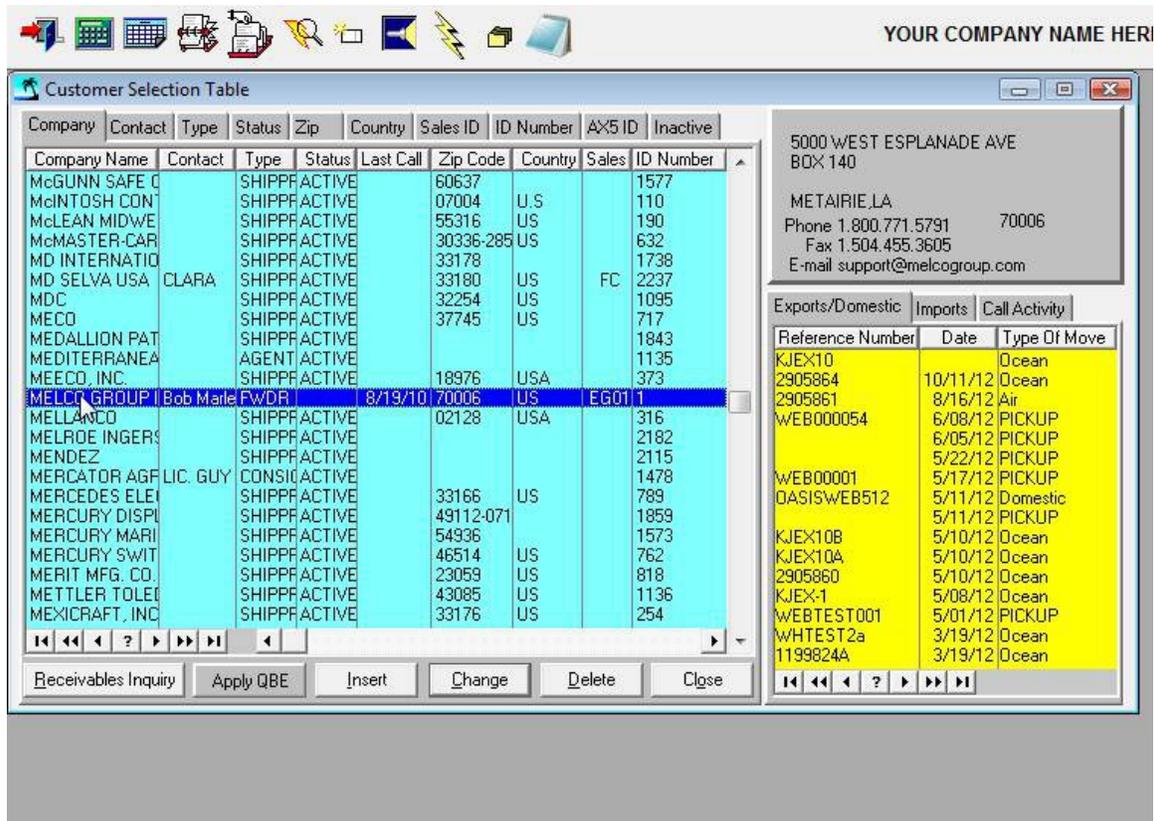
Depending on the TYPE {of shipment} selected the Document tab will display available system documents.. Only "completed" documents will be available for selection. Tagging selected documents which will be highlighted in {Blue} and clicking on OK will save your selections and will automatically be delivered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

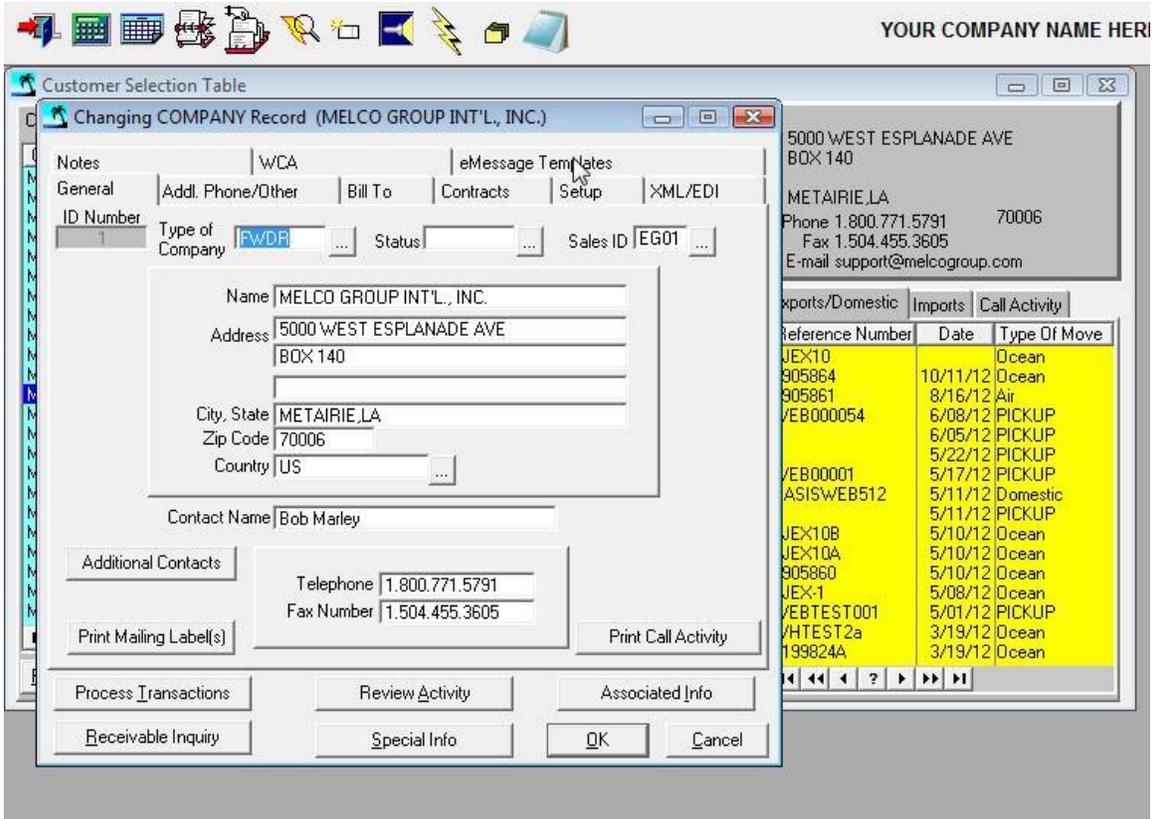
### Rolodex

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 overwriting the standard templates utilized system wide.

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

Melco Group Intl., Inc.  
 OASIS 'Ocean Air Shipping Information System.'

YOUR COMPANY NAME HERE

The screenshot displays the OASIS software interface. A dialog box titled "Changing COMPANY Record (MELCO GROUP INT'L, INC.)" is open, showing tabs for General, Addl. Phone/Other, Bill To, Contracts, Setup, XML/EDI, and Notes. The Notes tab is active, showing "WCA" and "eMessage Templates". Below this, there are four sections for setting default eMessage templates: "Export Shipment", "Import Shipment", "Call Record", and "Warehouse". Each section has a text input field and a "CLEAR" button. At the bottom of the dialog are buttons for "Process Transactions", "Review Activity", "Associated Info", "Receivable Inquiry", "Special Info", "OK", and "Cancel".

In the background, a "Customer Selection Table" window is visible, showing a table of transactions. The table has columns for Reference Number, Date, and Type Of Move. The data is as follows:

Reference Number	Date	Type Of Move
JEX10		Ocean
905864	10/11/12	Ocean
905861	8/16/12	Air
VEB000054	6/08/12	PICKUP
	6/05/12	PICKUP
	5/22/12	PICKUP
VEB000001	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
VEBTEST001	5/01/12	PICKUP
WHTTEST2a	3/19/12	Ocean
199824A	3/19/12	Ocean

## EMESSAGE PROCESSING

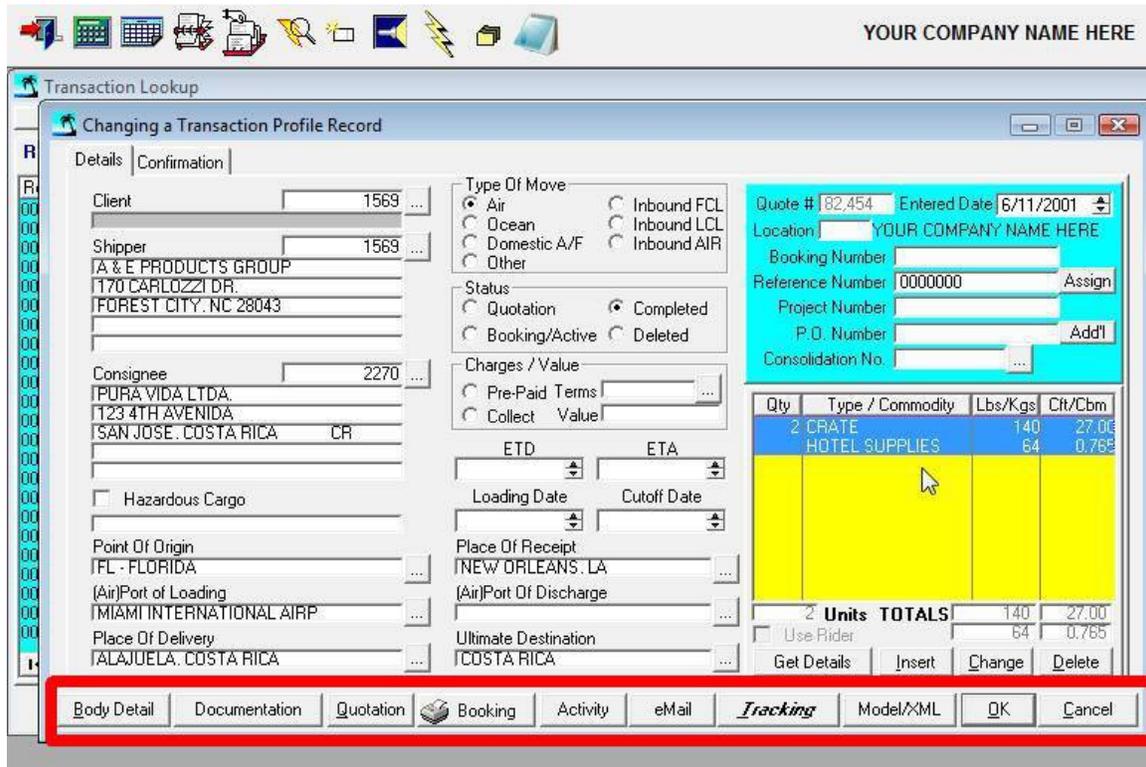
We will describe the steps necessary in order to process a typical OASIS eMessage in this section. **The processing steps required in executing an eMessage have been reduced from 7-10 to just 2.**

### 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 from 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.

The screenshot shows the OASIS email composition window. The 'Template' section is set to 'Warehouse Receipt'. The 'Subject' field contains 'Warehouse receipt information for your cargo'. The 'Message' field contains the text: 'attached please find your warehouse receipt for cargo recvd at our warehouse. You may open attached PDF document to view same. 12/22/2012 FALCON TRANSPORT INCGUANTA, VENEZUELA12'. The 'Data' section shows 'Warehouse Receipt' selected under 'Document Selection'. The 'From' field is 'donotreply@LogisticsInformer.com'. The 'Lookup Recipients' button is visible. The 'TO' field contains 'sales@falcon.com;support@falcon.com'. The 'CC' field is empty. The 'BCC' field contains 'sales@melcogroup.com;support@melcogroup.com;kc@kase.com'. The 'Attachment(s)' field is empty. There is a checkbox for 'Notify me when this email is received.' and 'CANCEL' and 'SEND' buttons at the bottom.

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.<sup>1</sup>

### Lookup Recipients

Automatically defaulted from eMessage Templates.<sup>2</sup>

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 ususly 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.

Changing a GENERAL INFORMATION Record

General | Country / Language | Move / Shipment | Air | Ocean | Billing | Warehousing | Model | eMail | AES VPN | test

### OasisEmessage Setup

SMTP Address:

SMTP Port:

SMTP Login:

SMTP Password:

Test Email Address:

eMail Footer

email footer goes here////

**NOTE! This information will appear at the end of ALL messages sent!**

## **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](mailto:support@melcogroup.com)

<http://www.melcogroup.com>