

CompassAir Web New User Guide

Basic Settings



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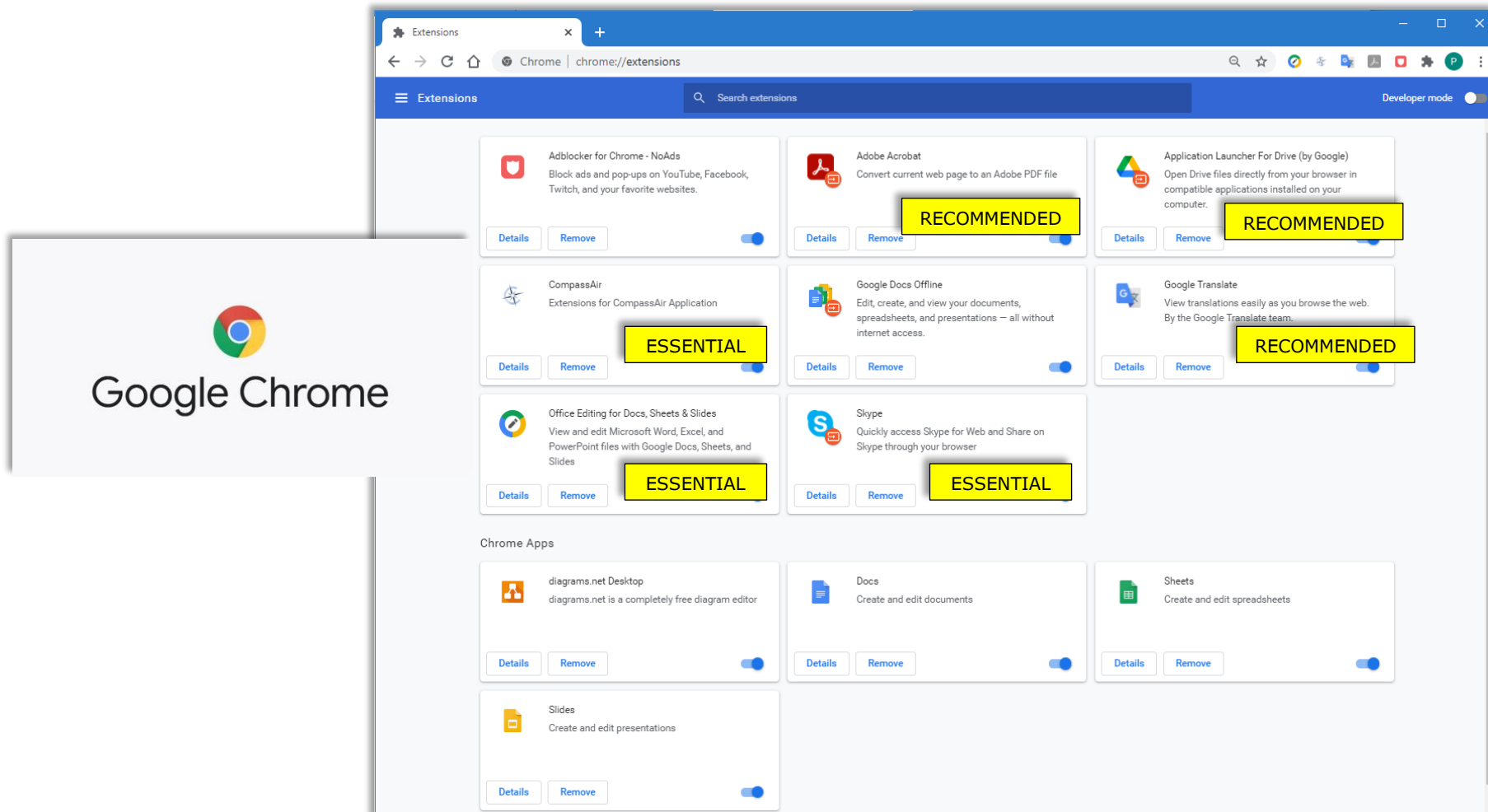
We are pleased to welcome you as a new user of CompassAir Web software.

This guide is intended to serve as an introduction to basic settings, allowing you to start making good use of our software. It is one of a series of guides that demonstrate how to use the many useful features of CompassAir (web version).

Where it is felt that additional training would be beneficial, bespoke packages can be provided for both individual users as well as groups. Please contact solutions@thinkcompass.io for more information.



1 GOOGLE CHROME AND EXTENSIONS



1. In order to make best use of all the features of CompassAir Web version we recommend that you use the Google Chrome web browser.

2. For full functionality please download the following Chrome Extensions: CompassAir (see 9 below), Office Editing and Skype.



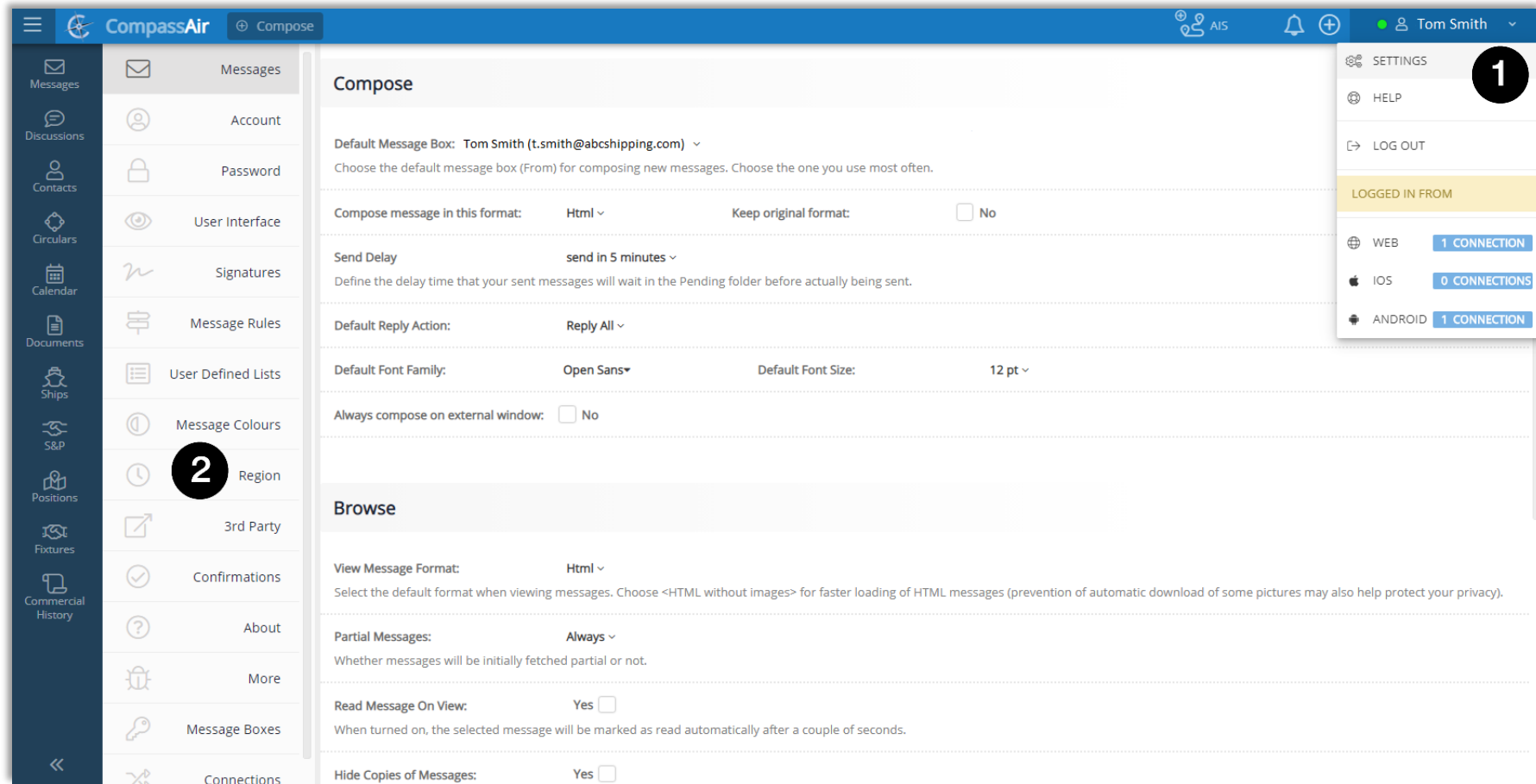
2 COMPASSAIR – MESSAGES WINDOW (HOME SCREEN)

The screenshot displays the CompassAir Messages interface. On the left, a dark blue sidebar contains navigation icons and labels: 'Messages', 'Discussions', 'Contacts', 'Circulars', 'Calendar', 'Documents', 'S&P', 'Positions', 'Fixtures', and 'Commercial History'. A 'Toolbar Buttons' callout points to the top of this sidebar. Below the sidebar is a 'Views' callout pointing to the message list filters. At the bottom of the sidebar is a 'Toolbar' callout. The main message list is labeled 'Message List'. A 'Filing Tray' callout points to the 'Company Asia Rules' folder. The right side of the screen shows a 'Message Header Pane' with details like 'Received Today 05:25 at @Wanderland SnP' and 'From: Hellenic Shipping News Worldwide'. Below this is the 'Viewing Pane' showing the full email content, including a 'Message Preview Pane' with a thumbnail and text snippets. The interface includes a search bar, filters, and a 'Compose' button at the top.

1. For more information about the above see the CompassAir Web Guides, accessible from Help under the user's name, or alternatively directly at <https://mycompassair.com/compassair-web-guides/>. For example, information relating to Views and how to customise these can be found in User Guide Volume 3.

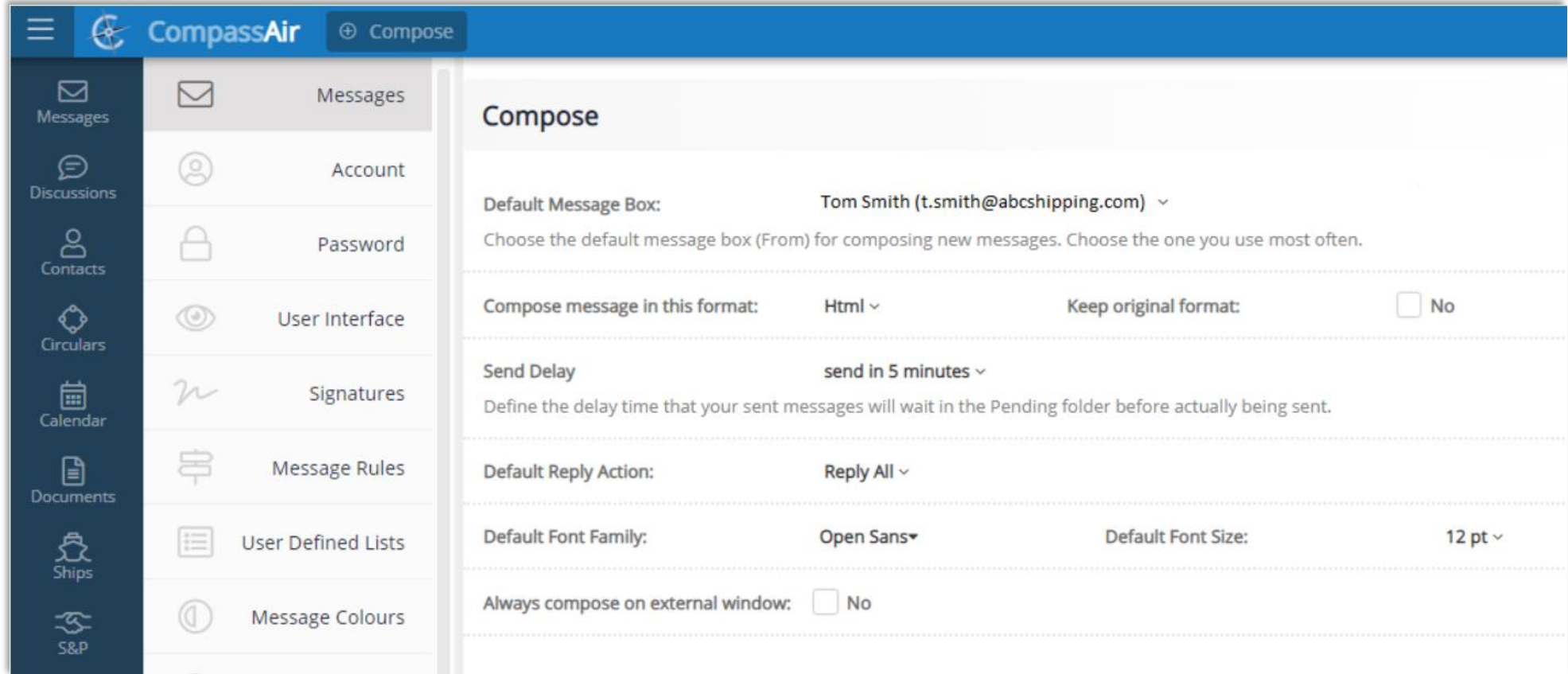


3 COMPASSAIR SETTINGS - GENERAL



1. Access to CompassAir settings is available from the dropdown menu, under the user name. The menu also shows the number of current connections to the account (i.e. web, IOS and/or Android) with the option to end each by clicking on it and then selecting "Terminate".
2. By clicking on the appropriate item in the list, the related settings are made available for customisation.
3. Any changes made to an individual setting are automatically saved and synchronised across all connections where applicable (i.e. IOS, Android and web).

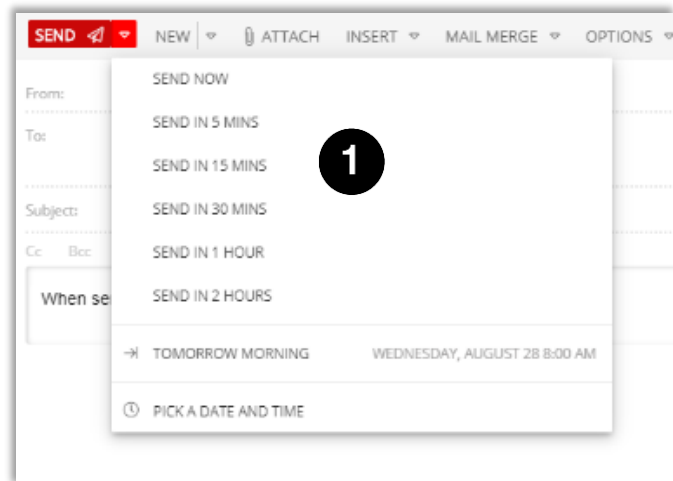




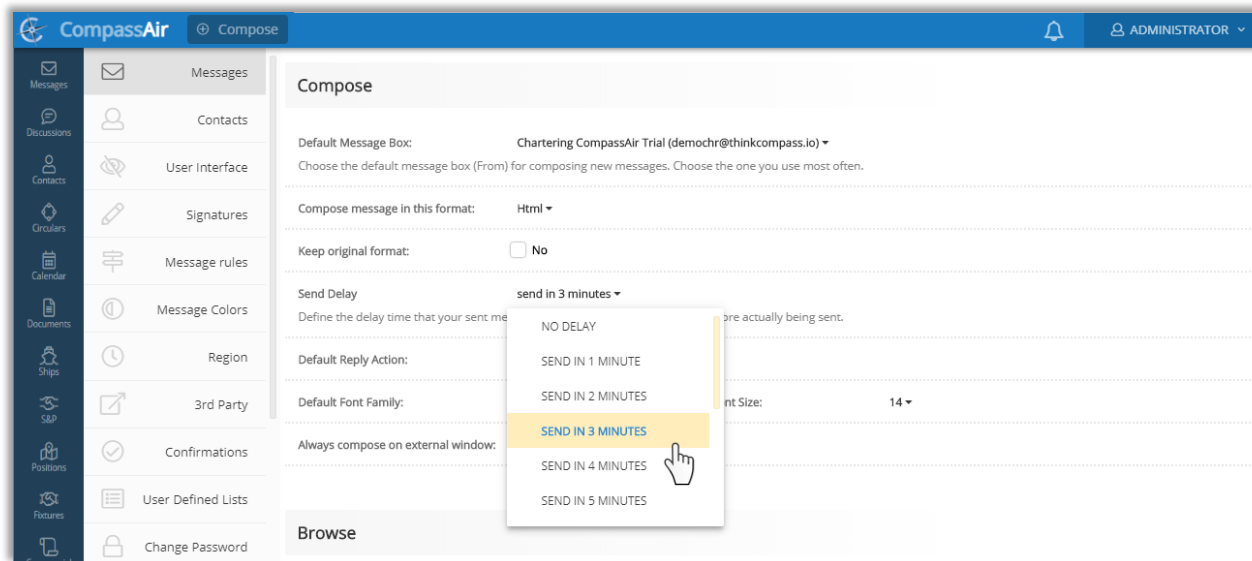
1. Messages/Compose consists of a number of options that allow a user to choose default settings when composing new messages.
2. When a user has access to a number of mailboxes, the one most frequently used can be set as default.
3. Some of these options are introduced below.



5 MESSAGES/COMPOSE: MESSAGE SEND DELAY



1. When a new message has been composed, the option exists to then delay sending it. This is done using the drop down menu, found next to the red "Send" button. This is useful where, for example, further relevant information needs to be checked or received. It also allows the message to be revisited after a short delay, if that is considered necessary. Delayed messages are then stored in the "Pending" View and are available for editing by the user until immediately before despatch
2. The default delay, if any, can be selected under "Messages" in Settings, from "No Delay" to "Send in 24 Hours"



5 MESSAGES/COMPOSE: MESSAGE SEND DELAY (continued)

The screenshot displays the CompassAir messaging interface. On the left, a sidebar shows navigation options like Messages, Discussions, Contacts, etc. The main area shows a 'Pending' message from Bruce Banner to Tony Stark, scheduled for 14:57. A green bar at the bottom of the message preview indicates it is scheduled to be sent after 59 minutes, with a 'CANCEL' button. A blue button labeled 'VIEW PENDING' is positioned below the message. A 'Filing' section is visible at the bottom left. Numbered callouts (3, 4, 5) highlight the 'VIEW PENDING' button, the 'SEND NOW' button, and the 'CANCEL' button respectively.

1. When a message is sent (and transferred to "Pending") a blue box immediately pops up allowing the user to view the message in the pending view, achieved by clicking on "View Pending"
2. There it can be edited, cancelled, deleted or dispatched with a different delay.
3. The message can also be cancelled by clicking on the "Cancel" button on the green bar, on which there is also a timer, counting down the time to when the message is sent. This is useful where the user has a number of pending messages, needs to edit one or more and hence needs to prioritise



6 BROWSE

Category	Setting	Value	
Navigation	Contacts		
	Circulars		
	Calendar		
	Documents		
	Ships		
	S&P		
	Positions		
	Fixtures		
	Commercial History		
		←	
	Settings	Password	
		User Interface	
	Signatures		
	Message Rules		
	User Defined Lists		
	Message Colours		
	Region		
	3rd Party		
	Confirmations		
	About		
	More		
	Message Boxes		
	Connections		
	Browse		
	View Message Format:	Html ▾	
	Select the default format when viewing messages. Choose <HTML without images> for faster loading of HTML messages (prevention of automatic download of some pictures may also help protect your privacy).		
	Partial Messages:	Always ▾	
	Whether messages will be initially fetched partial or not.		
	Read Message On View:	Yes <input type="checkbox"/>	
	When turned on, the selected message will be marked as read automatically after a couple of seconds.		
	Hide Copies of Messages:	Yes <input type="checkbox"/>	
	When turned on, duplicates of a message in different message boxes will be hidden.		
	Condensed Message List:	Yes <input type="checkbox"/>	
	When turned on, the items in the messages lists will be displayed condensed.		
	Show Description Over Subject:	<input type="checkbox"/> No	
	When turned on, the description of the current message will be shown instead of the Subject.		
	Space moves down:	Yes <input type="checkbox"/>	
	Show only following readers:	All ▾	
	Choose which readers of a message to display by default.		
	Messages view split direction:	Vertically ▾	

1. Messages/Browse allow a user to customise the way they see messages on the home screen.



7 MESSAGES/BROWSE: HIDING DUPLICATED MESSAGES

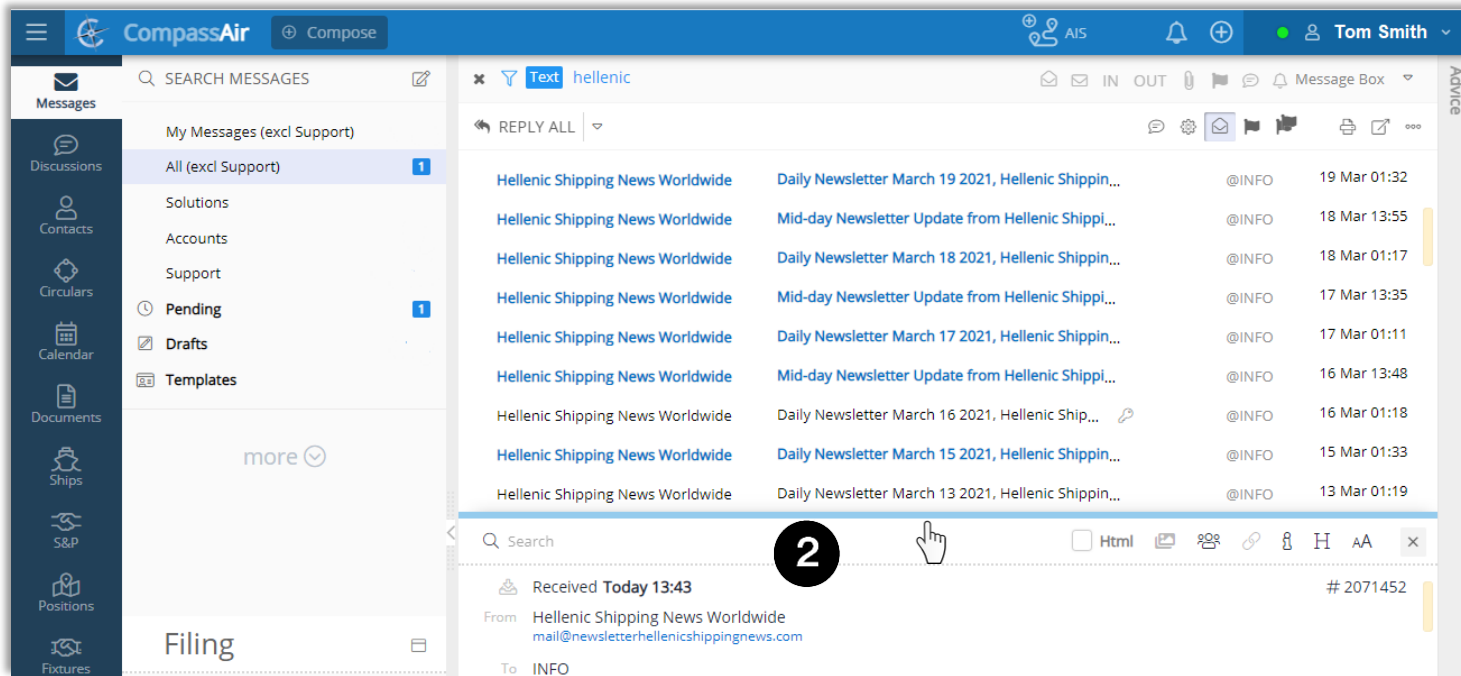
The screenshot shows the CompassAir settings interface. The left sidebar contains various settings categories: Messages, Account, Password, User Interface, Signatures, Message Rules, User Defined Lists, Message Colours, Region, 3rd Party, Confirmations, About, More, Message Boxes, and Connections. The main content area is titled 'Browse' and contains the following settings:

- Default Reply Action: Reply All
- Default Font Family: Open Sans
- Default Font Size: 12 pt
- Always compose on external window: No
- View Message Format: Html
- Partial Messages: Always
- Read Message On View: Yes
- Hide Copies of Messages: Yes** (highlighted with a red circle and the number 1)
- Condensed Message List: Yes
- Show Description Over Subject: No
- Space moves down: Yes
- Show only following readers: All

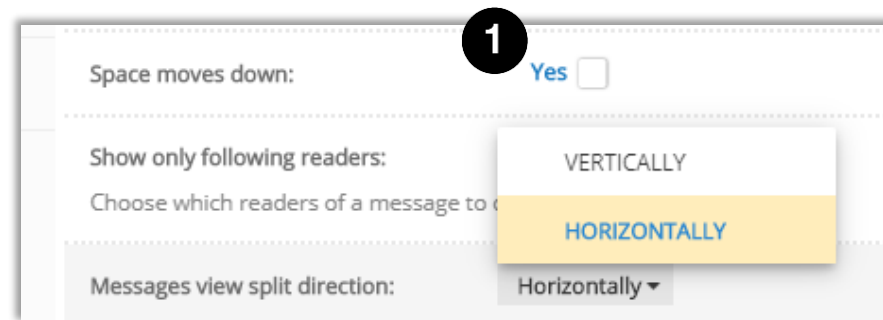
1. When defining message Views (see Volume 3 CREATING CUSTOM MESSAGE VIEWS) it is possible to accumulate messages relating to a number of different addresses in that one View. For example, My Messages might include info@abc.com as well as admin@abc.com, with a supplier sending the same message to both addresses. By toggling “Hide Copies of Messages” to “Yes” under Messages Settings, when an identical message is sent to both addresses only one copy will be displayed in a particular message View
2. When a duplicated message has been read with “Hide Copies of Messages” turned on, all duplicates are also marked as read at the same time



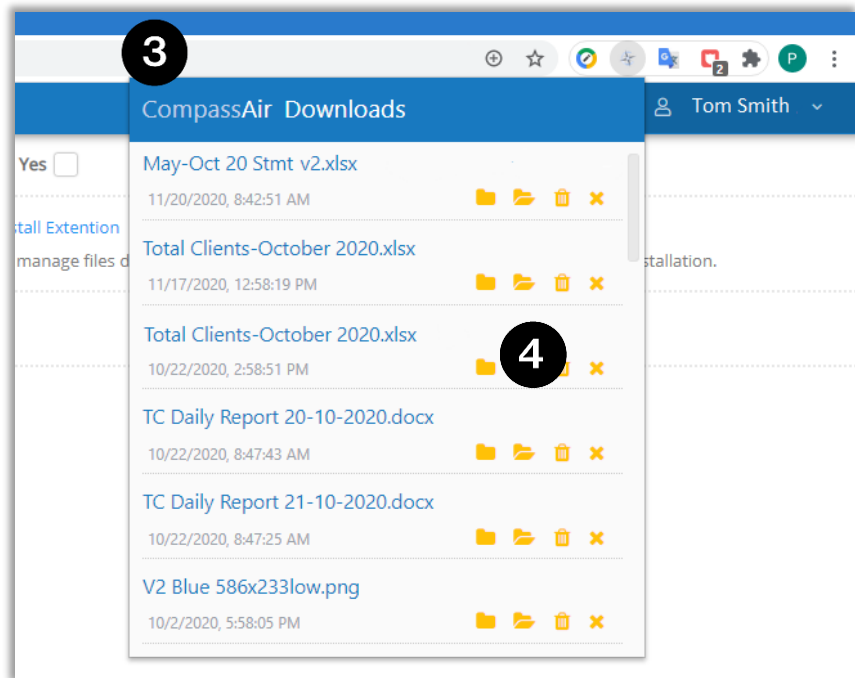
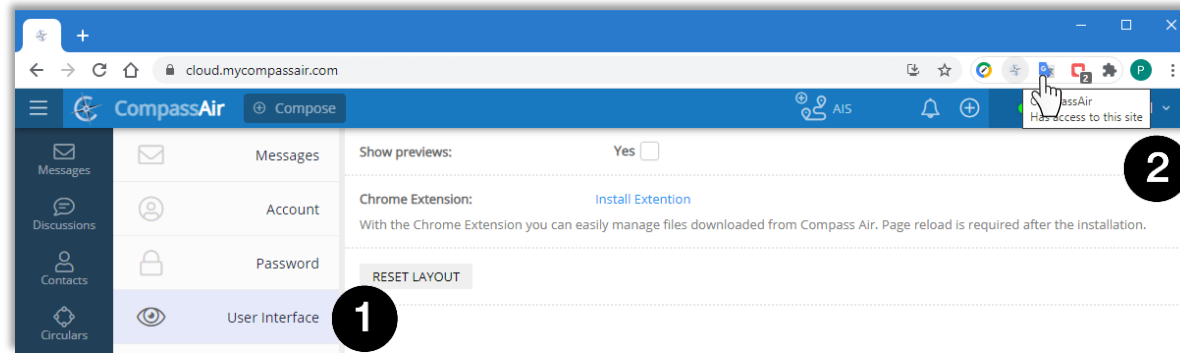
8 MESSAGES/BROWSE: MESSAGE VIEW – HORIZONTAL OR VERTICAL



1. The default view is for the screen to be split vertically as in 0 above. Using Messages/Settings this can be changed to a horizontally split screen
2. The size of the viewing screen can be adjusted by dragging the blue line up or down
3. Double clicking on a message opens that message in a new window



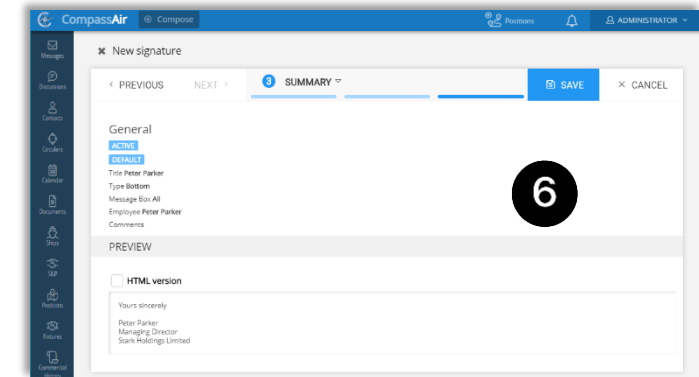
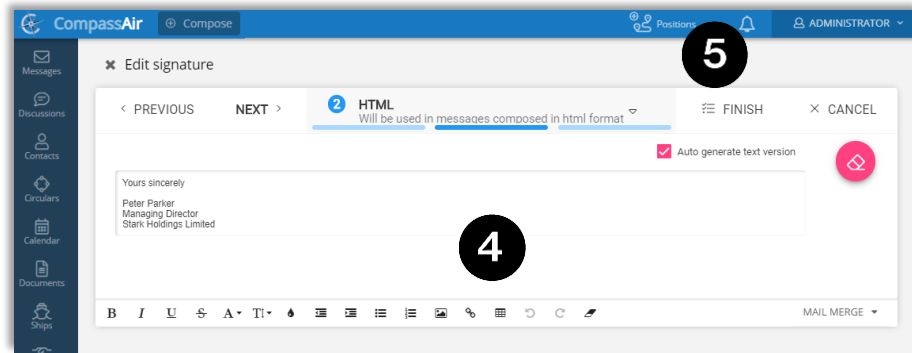
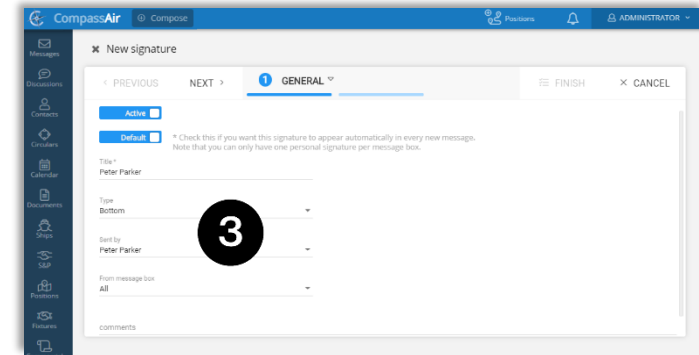
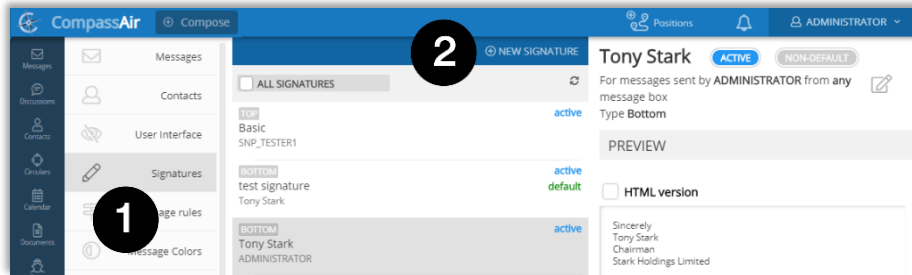
9 USER INTERFACE: CHROME EXTENSION



1. The CompassAir Google Chrome extension can be installed from the Settings menu, under “User Interface”
2. Once installed, the CompassAir icon will be visible on the Chrome toolbar
3. By default, files are downloaded from Chrome to the Download folder on your local drive (this can be changed from within a user’s Chrome browser settings). However a different folder can then be selected from the Windows “Save As” pop-up. Rather than opening File Explorer each time, the most recent files downloaded from CompassAir can be seen by clicking on the CompassAir icon in 2 above
4. Each file is then quickly accessible. It can be viewed in the download folder, opened, deleted or removed from this most recent list, each action achieved by selecting one of the four yellow icons



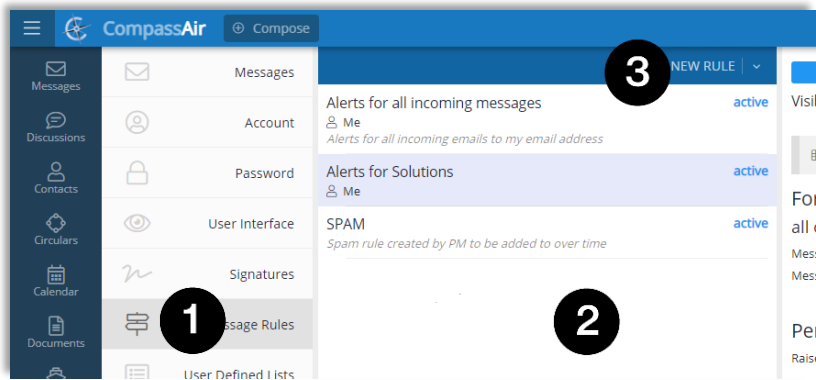
10 SIGNATURES



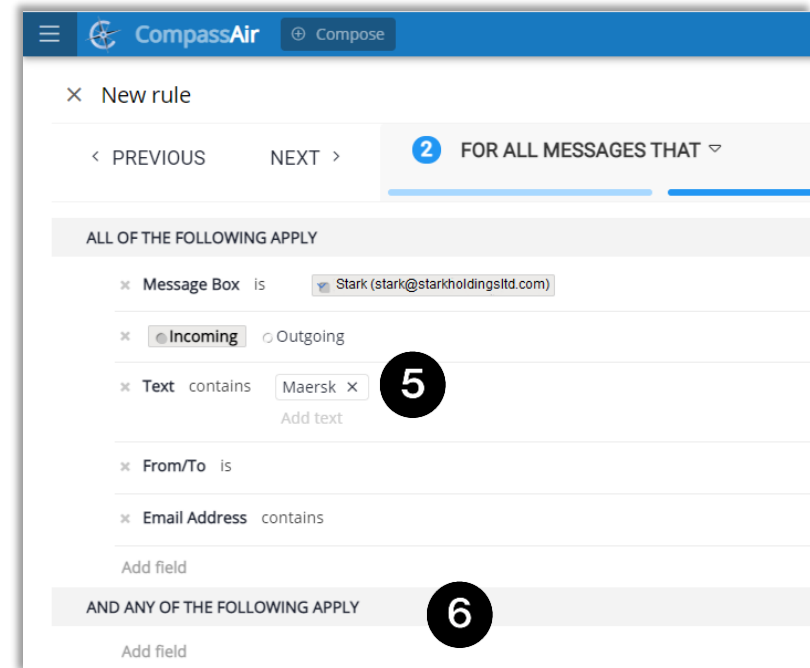
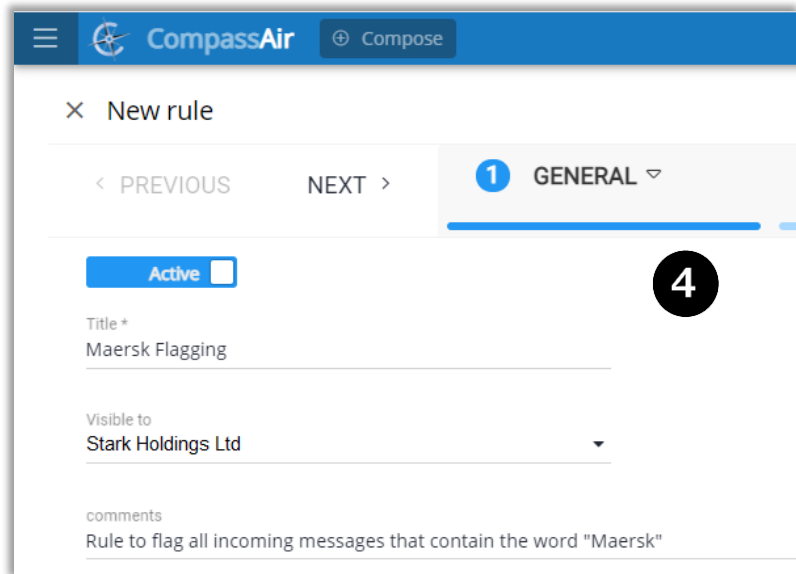
1. New signatures are created via the Settings menu from "Signatures", existing signatures being visible in the viewing panel, showing which are active and which is the default. They can be selected and edited as required
2. Clicking on "New Signatures" enables additional customised signatures to be created
3. A description of the new signature is made under "1 General" and can now (or later, when edited) be set as active/inactive, default or not
4. The content of the signature and its format are created in the viewing pane, for consistency using the same formatting that is made available when composing messages
5. A summary of the content and characteristics of the new signature is displayed by clicking on the "Finish" button. Alternatively the content can be cleared and re-entered, or the creation of the signature cancelled.
6. Once the user is satisfied with the content and format, the new signature can then be saved for future use



11 MESSAGE RULES



1. Messages Rules are used to automate tasks. To create a new message Rule, select "Message Rules" from the Settings menu. Rules are also used to handle incoming spam – see Volume 5 for more information
2. Existing Rules are listed in the middle pane
3. The example about to be created flags for all employees all incoming messages containing the word "Maersk", starting by clicking on "New Rule"
4. The new Rule is then described at step "1 General"
5. Next, the specific parameters are defined for the Rule to apply. In this case the text of the message should contain the word "Maersk"
6. Unused parameters can be deleted or more added by clicking on "Add Field"



11 MESSAGE RULES (continued)

CompassAir Compose

× New rule

< PREVIOUS NEXT > 3 PERFORM THE FOLLOWING ACTIONS ▾

- Mark read for select employee ▾
- Mark unread for select employee ▾
- Add flag for select employee ▾
- Flag for all** 7
- Raise alert for select employee ▾
- Add keyword type
- File to folder select path
- Auto reply
- Forward to enter address
- Classify as Gray
- Classify as Spam enter score
- Relate to ship Select ship
- Relate to fixture Select fixture
- Relate to deal Select deal

CompassAir Compose AIS Tom Smith

× New rule

< PREVIOUS NEXT > 4 ON THE FOLLOWING SCHEDULE ▾ FINISH CANCEL

Start: 24 Mar 2021 End: 31 Mar 2021 remove

Repeat: Daily 8

Time: From: : To: :
Enter comments

[Add schedule](#)

- Under step 3, the necessary action to be taken is selected, in this case to flag the message for all employees
- An option to apply the Rule for a predefined period is available at step 4, the default being to apply it without any time constraints
- Finally, the properties of the new Rule are displayed at step 5 and, if satisfactory, can be saved, alternatively, they can be edited using the “Previous” button. Once saved, the properties can be further edited at a later time, with the option to make the scheme active or inactive (i.e. deferred for use on a later date)

CompassAir Compose AIS Tom Smith

× New rule

< PREVIOUS NEXT > 5 SUMMARY ▾ SAVE CANCEL

General

ACTIVE

Title Maersk Flagging

Visible to Stark Holdings Ltd

Comments Rule to flag all incoming messages that contain the word "Maersk"

For all messages that all of the following apply

Message is Incoming

Text contains Maersk

Message Box is Stark (stark@starkholdingsltd.com) 9

Perform the following actions

Flag for all

On the following schedules

Start: 2021-03-24 End: 2021-03-30T21:00:00.000Z inactive

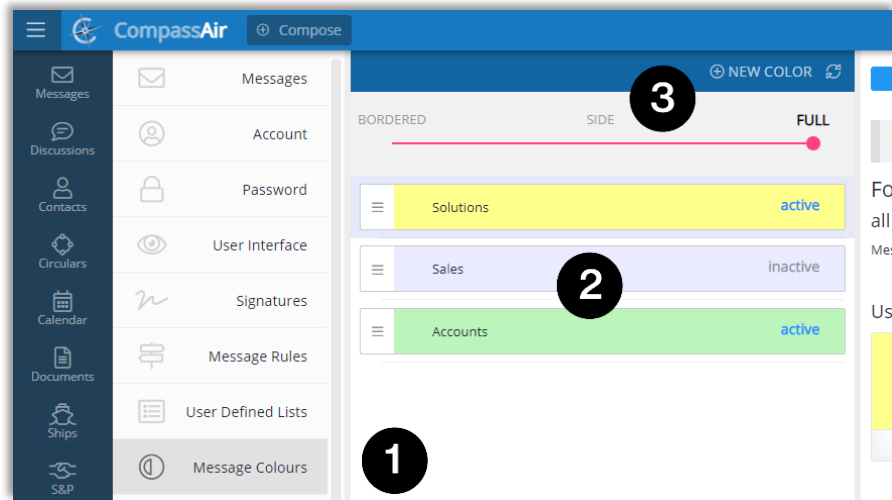
Repeat: Daily

Time: -

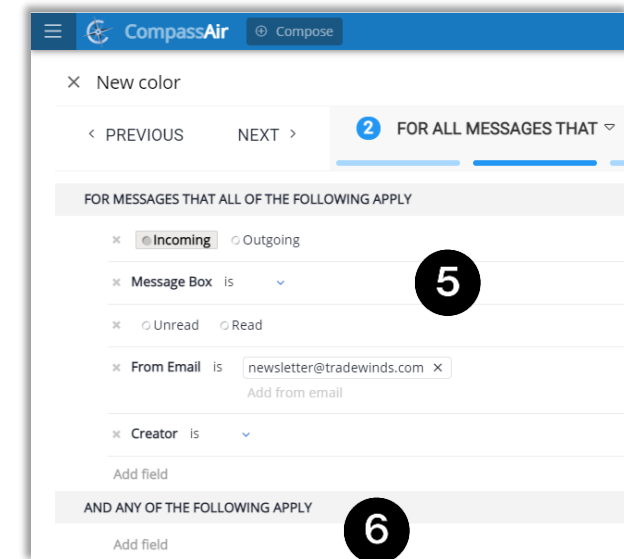
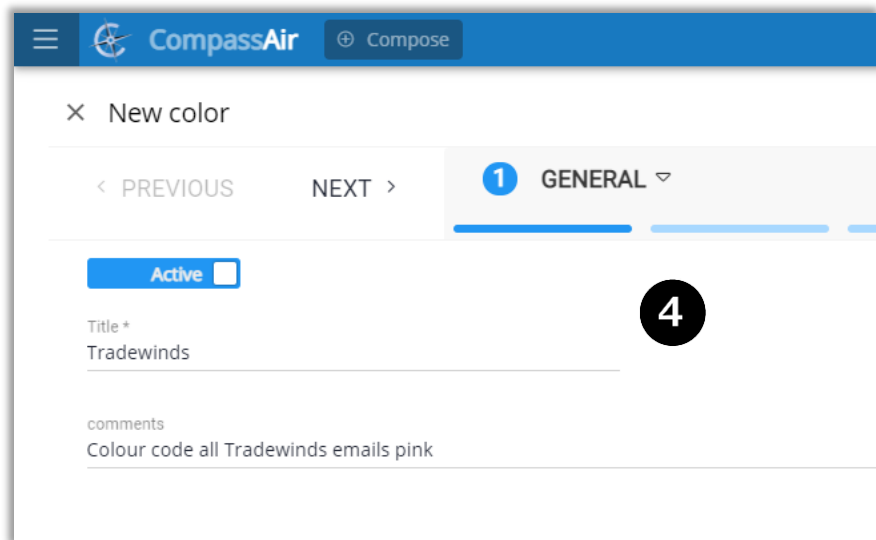
[Menu](#)



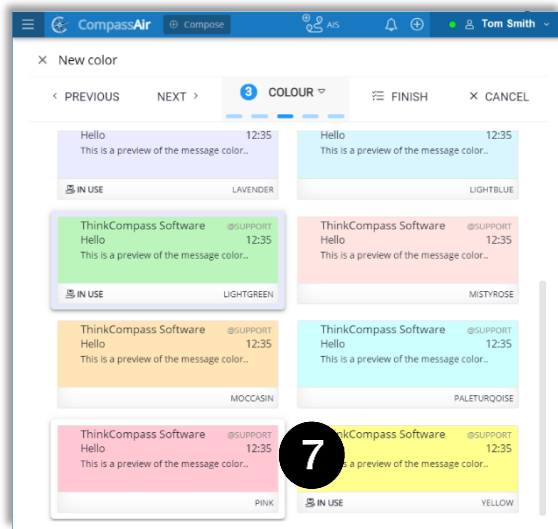
12 MESSAGE COLOURS



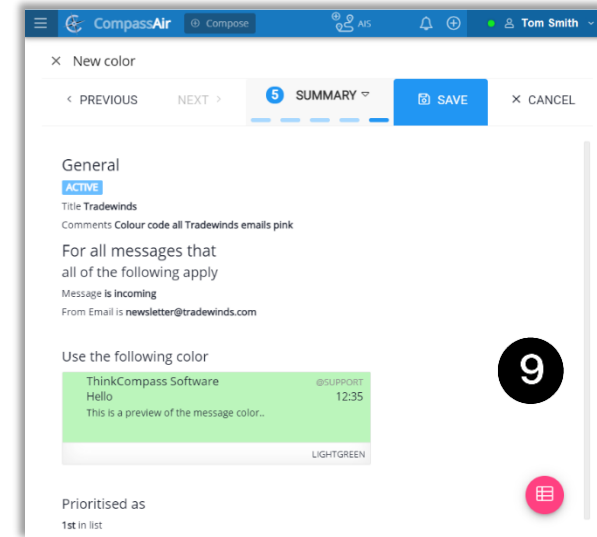
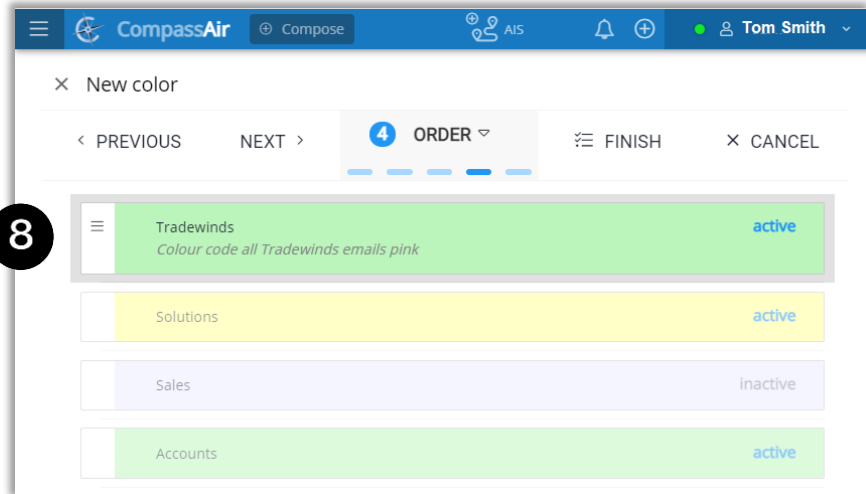
1. Messages can be colour coded for ease of reference. To set up colour coding select “Message Colours” from the Settings menu. Pale colours have been deliberately chosen to allow black text to remain visible through the colour
2. Existing colour coding is shown in the middle pane
3. In this example we want all incoming messages from Tradewinds to be shown in pink, starting by clicking on “New Colour”
4. The colour coding scheme is described in step “1 General”
5. Next, the specific parameters are defined to which the colour coding is to be applied.
6. Unused parameters can be deleted or more added by clicking on “Add Field”



12 MESSAGE COLOURS (continued)



7. At step "3 Colour" the identifying colour is chosen
8. The existing colour coding schemes are then displayed in step "4 Order". Here the option is given to prioritise the order in which these schemes are applied. This is done by dragging respective boxes up or down. In this example the "Tradewinds" colour scheme takes preference over all others.
9. Finally at step "5 Summary", the properties of the new scheme are displayed and, if acceptable, can be saved or, alternatively, they can be edited using the "Previous" button. Once saved, the properties can be further edited, at a later time, with the option to make the scheme active or inactive (i.e. deferred for use on a later date)

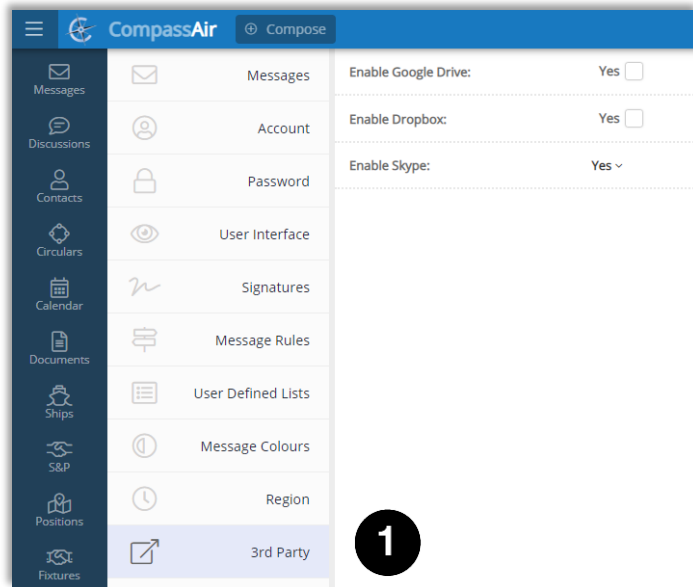


The screenshot displays the CompassAir application interface. At the top, there is a blue header bar with the CompassAir logo, a 'Compose' button, and user information for 'Tom Smith'. A dark blue sidebar on the left contains navigation icons for Messages, Discussions, Contacts, Circulars, Calendar, Documents, Ships, S&P, and Positions. The main content area is divided into two columns. The left column lists settings categories: Messages, Account, Password, User Interface, Signatures, Message Rules, User Defined Lists, Message Colours, and Region (which is highlighted). The right column shows the settings for the 'Region' tab, including 'Date Format' set to 'Day Month', 'Mail Merge Time Zone' instructions, 'Time Zone' set to '(UTC+02:00) Athens, Bucharest', and 'Customized Time Zone Name' set to 'tsmith'.

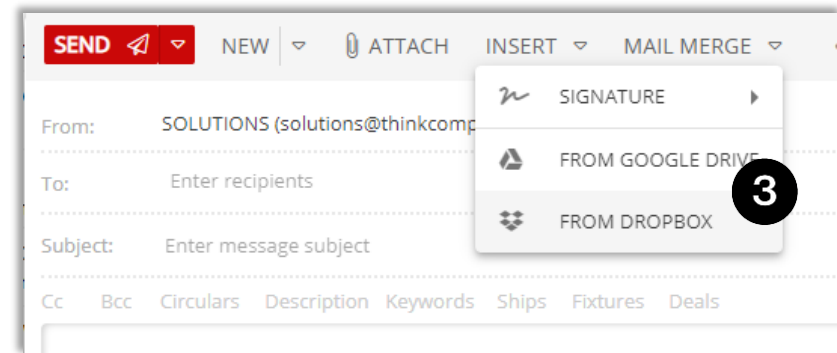
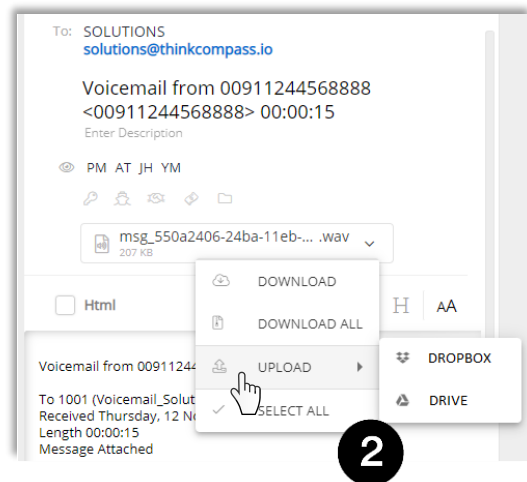
1. Both the date format and the user's time zone can be set using the Region tab.



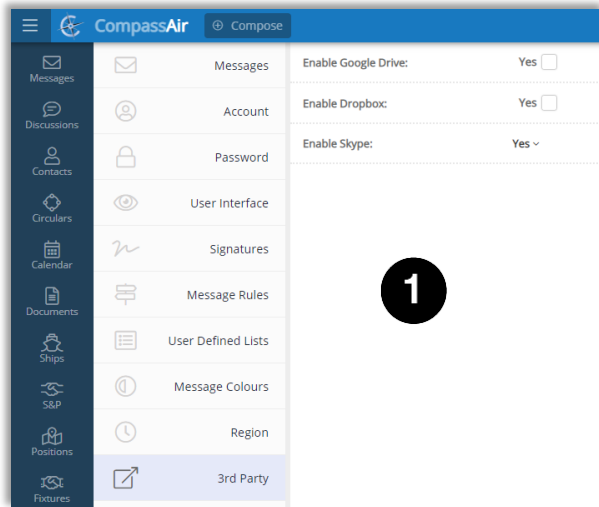
14 3rd PARTY: GOOGLE DRIVE AND DROPBOX



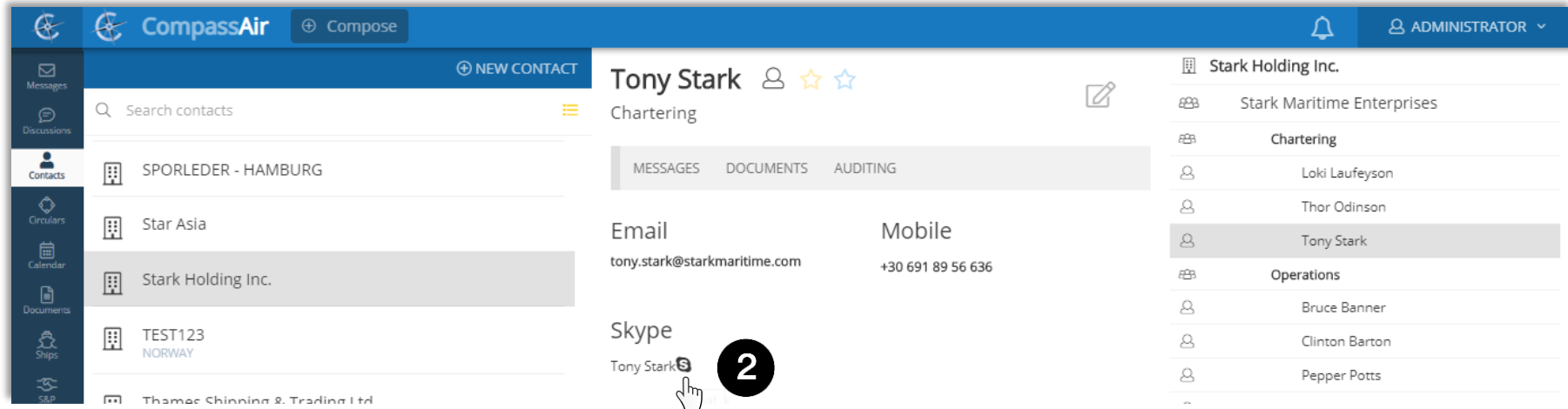
1. Access to Google Drive and Dropbox is enabled under “3rd Party” settings
2. Once enabled, message attachments can be saved directly to Google Drive and DropBox, the respective icons being revealed from the drop down menu next to the file name. The attachment can also either be previewed or downloaded to the user’s hard drive in the same way. It should be noted that the first time this facility is used it is necessary for the user to log in to either Google Drive or DropBox
3. Attachments from either Google Drive or DropBox can also be added to messages being composed within the Message Editor. These options are available from the “Insert” dropdown menu



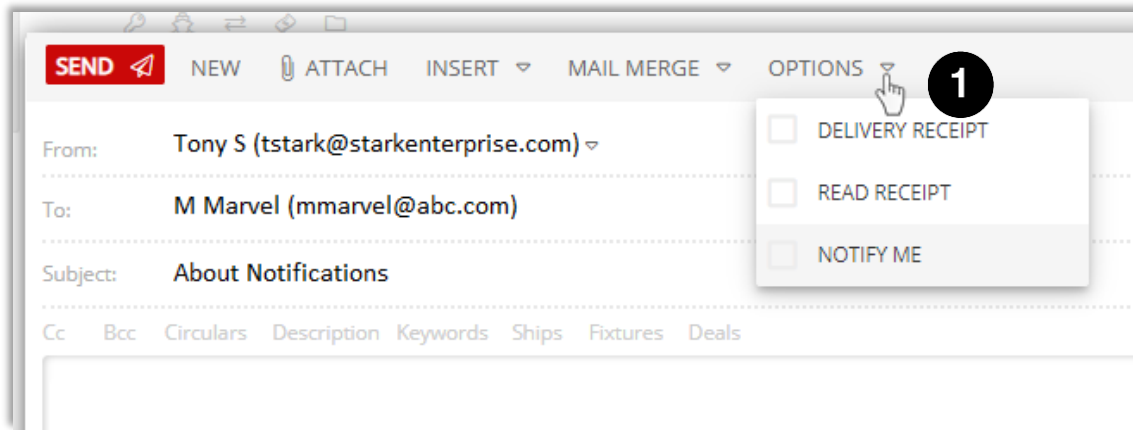
15 3rd PARTY: SKYPE INTEGRATION



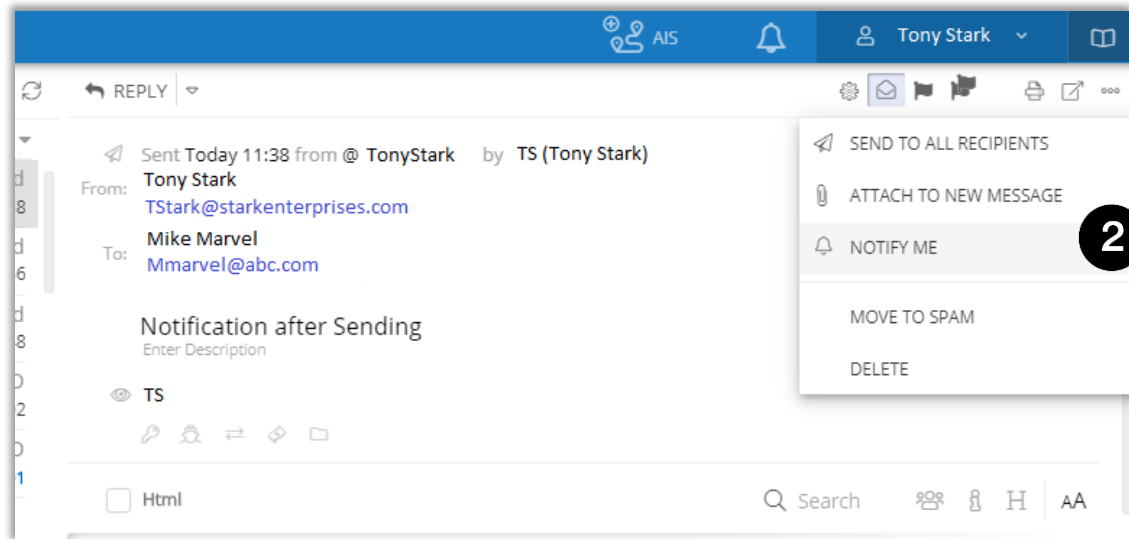
1. Integration with Skype is enabled under “3rd Party” settings
2. Once enabled, and when Skype addresses are stored in contacts, clicking on the Skype icon next to a name opens Skype at that contact’s name. Skype can then be used in the normal way to commence an audio or video call or to send a message. The dropdown menu next to “Enable Skype” allows a user to choose between Skype or Skype for Business



16 NOTIFICATIONS (alerts when sending and receiving messages)



1. If a user needs to know when a reply arrives in response to an email they are sending, a notification can be set up using the "Options" drop down mention when composing the message. Providing "Show notifications" has been ticked under your phone's Application Settings for CompassAir, and CompassAir is running minimised, a pop-up message will appear on your phone upon receipt
2. Alternatively, if the message has already been sent, the same option appears in the drop down menu that appears after clicking the ellipsis at the top right hand corner of the message
3. If the same option is selected as for 2 above for an incoming message, a pop up notification will again appear on your phone when a reply is sent from within your own organisation (i.e. from mailbox that you share). If a reply is sent by the user who selected the "Notify Me" on the incoming message, then a notification will not be generated



16 NOTIFICATIONS (continued)

CompassAir Compose

× New rule

< PREVIOUS NEXT > **1** GENERAL ▾

Active

Title * Alerts for all incoming messages

Visible to Me

comments Alerts for all incoming emails to my email address

CompassAir Compose

× New rule

< PREVIOUS NEXT > **2** FOR ALL MESSAGES THAT ▾

ALL OF THE FOLLOWING APPLY

× Message Box is Tom Smith (tsmith@abcshipping.com)

× Incoming Outgoing

CompassAir Compose

× New rule

< PREVIOUS NEXT > **3** PERFORM THE FOLLOWING ACTIONS ▾

Mark read for select employee ▾

Mark unread for select employee ▾

Add flag for select employee ▾

Flag for all

Raise alert for select employee ▾

Add keyword type Filter ...

File to folder select

Auto reply

Forward to enter address

Classify as Gray

Classify as Spam enter score

Relate to ship Select ship

Relate to fixture Select fixture

Relate to deal Select deal

1. Notifications can also be turned on for all or selected emails by setting up a new rule (see volume 5, section 3).
2. Choose for which message box(es) notifications are required (this can be all or any for which you have access) together with any other parameters you require to customise the alerts.
3. At stage 3 toggle on “Raise Alert”, selecting yourself.
4. The next step, stage 4, allows the option to use the rule for a defined period. For notifications required going forward the default starts with today’s date. Once set, the rule is summarised with the option either to edit or save.
5. As with other rules, notifications can be suspended without deleting the rule, achieved by toggling the completed rule from “Active” to “Inactive”.

