

TOP TO BOTTOM, WHAT EVERY SECTION IS FOR

Know Your Panel.

Everything under the dark file bar belongs to that one file. Before you act, check that the file bar shows the file this email is about.

1 Apps
Helm

2 Selected email
Re: S00012345 / Cntr MSCU1234567 – delivered 9/24

3 SUGGESTED UPLOADS
We found 1 document in this email that looks like a Proof of Delivery for S00012345.
CLASSIFIED 1 OF 1
Review & Upload Documents >

4 < 3 files match this email + Actions ▾

5 S0012345 Ref: PO-88213

6 Details
Transport Status ✓ Delivered
Reference ID S00012345 ↗
MBL/BOL MEDU4471902
Transport Mode Ocean (FCL)
Last Updated 24-Sep-2026, 1:15 PM
View in Portal

7 Routing ▾
PRE-CARRIAGE Edit
Pickup Ningbo ATD 11-Sep
MAIN CARRIAGE Edit
POL Shanghai ATD 14-Sep
Shanghai → Long Beach ATA 22-Sep
POD Shanghai ATA 22-Sep
ON-CARRIAGE Edit
Delivery Salt Lake City ATA 24-Sep
Copy Route Info

8 Operators ▾
Jordan Lee
Salt Lake City Operator

9 Containers ▾
MSCU1234567 Track on carrier ↗
Location: Salt Lake City, UT
Event: Delivered · 24-Sep-2026

10 Organizations ▾
Acme Imports LLC
Consignee Local Client
Pacific Supply Co.
ops@pacificsupply.com +1 555-0142
Shipper

11 Documents ▾
POD_S00012345.pdf
Proof of Delivery · Automated Data Import

Illustration with sample data. Collapse any section with its ^ arrow.

- 1 Pin**
Keeps Helm open as you click from email to email.
Use it: first thing each morning. Outlook closes idle add-ins, so re-pin if it disappears.
- 2 Suggested actions**
Helm's to-do for this email: documents it found and classified, or a filing it thinks is needed.
Use it: click through to review. Nothing is filed until you confirm.
- 3 Matches & Actions**
How many files Helm tied to this email. The arrow opens the list to switch files or Unlink a wrong one. Actions starts a new file or upload.
Use it: when the file bar below isn't the file you expected.
- 4 File bar**
The file you're working in right now. Every section below belongs to it.
Use it: glance here before every upload or edit.
- 5 Details**
Status, reference ID, MBL/BOL, mode, and Last Updated. The reference ID and View in Portal open the full record in Logixboard.
Use it: answer "where's my shipment?" without opening CargoWise.
- 6 Routing**
Every leg from pickup to delivery. Edit on each stage changes dates, and they write back to CargoWise. Copy Route Info copies the routing for a reply.
Use it: when a carrier sends a new ET A or arrival notice.
- 7 Operators**
Who owns this file in CargoWise.
Use it: to know who to loop in on a file that isn't yours.
- 8 Containers**
Each container's latest event, location, and date. The link opens the carrier's tracking page.
Use it: to check a container status in two clicks.
- 9 Organizations**
Every party on the file, with their role and contact details. Click an email address to start a draft with the file reference already in the subject. Staff assignments show who covers the file.
- 10 Documents**
What's in the file's eDocs, with type and source. Click one to download and attach it.
Use it: when a customer asks for a document you already have. New uploads take 2–3 minutes to appear.