

KEEP THIS NEXT TO YOUR SCREEN

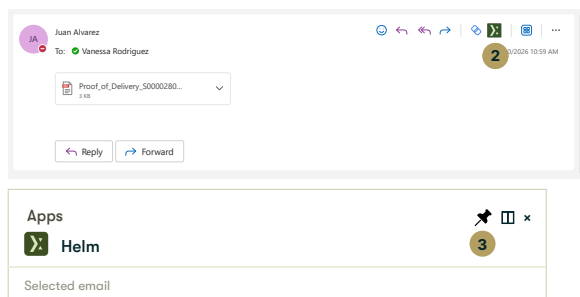
Helm at a glance.

Four things you'll do every day all without leaving Outlook.

01 Open & Pin Helm

First thing every morning

- 1 Click any shipment email in Outlook.
- 2 Click the Helm icon in the email.
- 3 Click the **pin** icon in the top right of the Helm panel.



Why pin? Helm stays open as you move from email to email, so you're not reopening it all day. One pin each morning is usually enough.

CHECK

Click a different email. Helm stays open beside it.

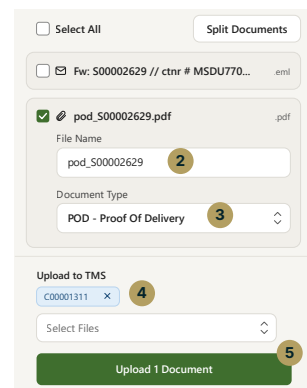
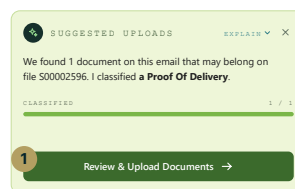
IF IT LOOKS OFF

Helm closed? Outlook shuts idle add-ins. Re-open and re-pin. **Not in the menu?** Ask IT or your manager.

02 Upload Documents

An email arrives with attachments to file

- 1 Open the email and click the green **Upload** button.
- 2 **Rename** the file as you see fit.
- 3 Confirm the **document type**. Change the dropdown if it's wrong.
- 4 Confirm the destination file.
- 5 Click **Upload**.



CHECK

Open the file's **eDocs** in CargoWise. Each document is there with its type.

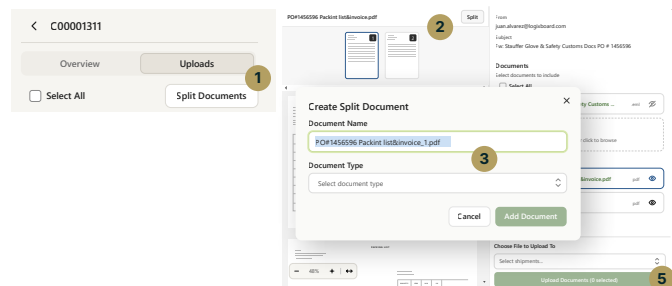
IF IT LOOKS OFF

Fix the type or name directly in CargoWise. Don't upload it a second time.

03 Split a Combined PDF

One attachment holds several documents

- 1 Go to **Uploads** and click **Split Documents**.
- 2 Select the page(s) for one document, then click **Split**.
- 3 Rename it, click **Select Document Type**, choose the type, then **Add Document**.
- 4 Repeat for each document inside the PDF.
- 5 Choose the file(s) to upload to and click **Upload Documents**.



CHECK

eDocs shows **separate** documents, each in its own category.

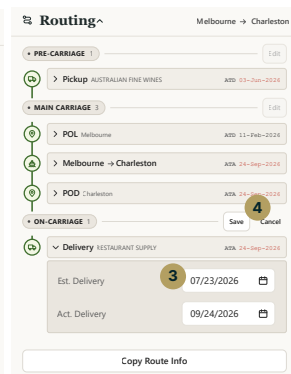
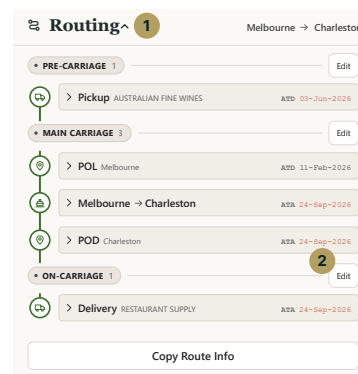
IF IT LOOKS OFF

Fix the split in Helm before you upload. Don't fall back to one combined file.

04 Update Route Dates

New ETA, arrival notice, rebooked vessel, delayed pickup

- 1 In the **Overview** tab, scroll to **Routing**.
- 2 Click **Edit** on the stage that changed.
- 3 Pick the new date from the calendar. Don't type it.
- 4 Click **Save**.



CHECK

The new date shows on the Routing card, and **Edit** is back.

IF IT LOOKS OFF

No Edit button? The CW file is closed. **Date looks stale?** It may have been changed on another CW tab.