

MOST ISSUES TAKE ONE CLICK TO FIX

Troubleshooting.

Find what you're seeing below. **you** means you can fix it yourself right now. **ask** means it's a setup item for your admin or Logixboard. It isn't something you did wrong.

HABITS THAT PREVENT MOST PROBLEMS

Verify, don't redo. Unsure it worked? Check CargoWise. Don't do it again there.

Unlink as you go. Clear wrong matches when found.

Suggestions are suggestions. Helm proposes; nothing is filed until you confirm.

File as it arrives. Upload docs when they land. Don't batch them.

GETTING INTO HELM

Helm isn't in my add-ins menu	Look for the four-squares icon in the ribbon or the email's top bar. If Helm isn't listed, log out of Outlook and back in. Still missing? It may not be deployed to you yet.	ASK IT / manager
Helm keeps closing	Outlook shuts idle add-ins. Re-open Helm and click the pin . Once each morning is usually enough.	YOU
"No TMS User Set"	Your Staff Reference isn't linked. Click the gear , enter your code, then Update User .	YOU
"No staff with that reference found"	Your code hasn't been set up on the CargoWise side yet.	ASK TMS admin

FINDING THE RIGHT FILE

Helm matched the wrong file	Click Unlink on it. Common when container, PO, or booking numbers get reused.	YOU
Several files are suggested	Pick using the strongest ID: file #, MBL/HBL, or container. View Details to compare, back arrow to return. Unlink the rest.	YOU
No match at all	Search by file #, MBL/HBL, container, or PO/booking ref, then Link File . Still nothing? The file may not exist yet (create it), or the email came through a shared mailbox that isn't set up.	YOU ASK if shared mailbox
I accidentally created a duplicate file	Unlink the duplicate and use the existing file. Always search before starting a new one.	YOU

DOCUMENTS

Wrong document type suggested	Change the dropdown before uploading. Picking the right type is the override. No suggestion at all is normal for less common docs, so pick it yourself.	YOU
I uploaded with the wrong type or name	Correct it directly in CargoWise eDocs. Don't upload it again.	YOU
A document I expect isn't showing	Wait 2–3 minutes; uploads from teammates take a moment to appear. Then check you're on the right file.	YOU
Upload fails on a large file	CargoWise limits uploads to 10 MB. Split the document, or ask if your setup allows larger files.	YOU ASK
Attached emails won't open	Windows Settings → Apps → Default Apps . Set .eml and .msg to Outlook , not "Outlook (new)".	YOU
CargoWise shows ~AD as the creator	A CargoWise configuration setting, not something you did.	ASK TMS admin

ROUTE DATES

No Edit button on Routing	The file is closed in CargoWise, usually an older, already-delivered shipment. Nothing to fix in Helm.	Expected
A date looks out of sync	It was likely changed on a different CargoWise tab, which doesn't always flow to Routing. Check where it was last updated.	YOU
I need to change more than dates	Routing edits are a shortcut for dates. Other fields still go through CargoWise as usual.	Expected

Still stuck? Go in this order.

- 1

Your Helm go-to on the team: _____
- 2

Your Logixboard Account Manager: _____
- 3

support@logixboard.com. Replies within 24 hours, Mon–Fri, 9am–6pm Pacific. Mark it urgent if work is blocked.

What to send with it

- The email subject line
- The file number Helm showed (or should have)
- What you clicked, and what you expected to happen
- A screenshot of the Helm panel
- Have an idea or a carrier you'd like added? Send tyour idea to your Account Manager too.