

FILE ATTACHMENTS WITHOUT LEAVING OUTLOOK

Uploading documents.

Helm finds the attachments on an email, suggests what each one is, and uploads them to the shipment's TMS. Here's what you'll see, step by step.

WHAT YOU SEE FIRST

Apps

Helm

Alex Rivera · 2h ago

Fw: S00012345 // ctrn # MSDU1234567 - delivered

SUGGESTED UPLOADS

EXPLAIN

×

We found 1 document on this email that may belong on file S00012345. I classified a **Proof Of Delivery**.

CLASSIFIED

1 / 1

Review & Upload Documents →

1

< 3 files match this email

Actions

S00012345

Melbourne → Charleston

Details

Transport Status

Delivered

Reference ID

S00012345

MBL/BOL

MSCU1234567

Transport Mode

Ocean (FCL)

AFTER YOU CLICK

Apps

Helm

< Review & categorize

Select All

Split Documents

✕

✉

Fw: S00012345 // ctrn # MSDU... .eml

2

✓

pod_S00012345.pdf

.pdf

File Name

3

pod_S00012345

Document Type

4

POD - Proof Of Delivery

↑

Drop files here or click to browse

Upload to TMS

5

S00012345 ✕

Select Files

⌵

Upload 1 Document

6

1

Click Review & Upload Documents

The green button on the Overview tab. It opens the email's attachments so you can review them and upload them to the shipment's eDocs folder.

2

Tick each document

Check every document you want in eDocs. The **envelope** item is the email itself; upload it to keep a record of the convo.

3

Rename the file

Edit the **File Name** box to match your naming standard.

4

Confirm the type

Helm pre-selects the **Document Type** when it's confident. Sometimes it doesn't identify the type, so you can pick the right one from the dropdown.

5

Confirm where it goes

The matched file is already under **Upload to TMS**. Add more from **Select Files** to send the same documents to each one.

6

Click Upload

The button shows how many documents you're sending. They go to the eDocs folder of every file listed.

Document types

Helm reads each attachment and pre-selects from over 150+ document types when it's confident, including:

Commercial Invoice

Packing List

House Bill of Lading

Master Bill of Lading

Arrival Notice

Proof of Delivery

Booking Confirmation

Pre Alert

ISF

Certificate of Origin

Good to know

File as it arrives.

Upload when documents land, not in a batch at the end. It keeps the paper trail current.

One combined PDF?

Refer to the Splitting Documents Quick Reference Card.

10 MB limit

per document, set by your TMS.

Published or not

follows your TMS settings for each document type. Helm doesn't change it.

New uploads

show in the Helm panel within 2–3 minutes.

Helm · Quick Reference Card

All Helm QRCs can be found at help.logixboard.com → Helm Documentation