



Moving from Logixboard to CargoWise Neo

Client Training and Familiarisation Guide

Your guide to tracking shipments, viewing documents and finding your way around the new Excel Logistics client portal.

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1. Welcome to CargoWise Neo

Excel Logistics is moving its client shipment-tracking service from Logixboard to [CargoWise Neo](#). Neo is the customer portal built by WiseTech Global, the maker of CargoWise, which is the operating system our team uses to run your freight forwarding and customs jobs.

Because Neo is web-based and connected live to CargoWise, the information you see is the same information our operators are working with. There is no overnight sync or third-party feed in between.

What this means for you

- **Live data.** Shipment status, milestones and events come straight from CargoWise as our team updates your jobs.
- **One place for everything.** Tracking, documents, orders and (where enabled) invoices and statements sit in one portal.
- **Live vessel and flight positions.** Neo can show where your cargo is on a map using vessel AIS and aircraft transponder data.
- **Room to grow.** WiseTech continues to add features to Neo. It is also the official replacement for the older CargoWise WebTracker portal.

About this guide

This guide is for Excel Logistics clients who used Logixboard and are now moving to Neo. It explains how to log in, how to find your shipments, and where Neo works differently from Logixboard.

Screenshots come from Excel's own Neo environment (sensitive details are hidden) and from WiseTech Global's public Neo preview. Your screens may look slightly different, depending on what access has been set up for your organisation.

2. Logixboard vs Neo at a glance

Most of what you did in Logixboard can also be done in Neo, but a few things work differently. The table below summarises the main changes. Each one is explained in more detail later in this guide.

Area	Logixboard	CargoWise Neo
Map	Shows every job matching your search filters (active jobs from the last week).	Shows only the jobs on the current page of the grid below the map. By default, this is jobs In Transit.
Seeing more jobs on the map	Not required.	Scroll to the bottom of the grid and set Items per page to 100.
Opening a job	One click shows all the information.	One click shows a summary and tracking history. Click the three dots (:) and choose View Details to see everything.
Order Manager	Standard left-click.	Right-click a line item to open the action menu.
Reports and analytics	Built-in Logixboard analytics.	No direct one-to-one match yet. Neo has a large report library (for example, greenhouse gas emissions). Excel is mapping equivalent reports.
Messaging	In-platform messaging.	For now, please email your Excel operator. In-portal messaging is under review.
Documents	View and download.	View and download eDocs from the job's : menu. Uploading is available where enabled.

3. Getting started

3.1 How your access is set up

You do not need to sign up. Excel Logistics sets up access for your organisation and for each person who needs it. Neo uses the organisation and contact records we already hold in CargoWise, so the steps are:

1. Excel confirms the list of people at your organisation who need access, along with their correct email addresses.
2. We set up your organisation's access permissions in Neo (for example, shipments, orders, documents and invoices).
3. Each person receives an automated email from CargoWise asking them to create a password.
4. Once the password is created, you can log in.

Tip

Look out for the password-setup email and check your junk or quarantine folder. If your IT team filters external mail, ask them to allow messages from CargoWise / wisegrid.net.

3.2 Logging in

Excel's Neo client portal address is: <https://www-excsyd.wisegrid.net/Portals/NEO/Desktop>

We recommend bookmarking this page. To log in you will need:

Field	What to enter
Email address	The email address Excel holds for you in CargoWise. Enter it exactly as provided. Some versions of Neo treat it as case-sensitive.
Password	The password you created from the setup email. It is case-sensitive.
Organisation code	Usually optional. If you are asked for it, use the code supplied in your welcome email from Excel.

If you forget your password, use the Forgot Password link on the login page, or ask your Excel contact to resend the password instructions.

3.3 What you will see

The menu on the left shows only the modules your organisation has access to. Common modules are Forwarding (Shipments, Containers, Bookings), Order Manager, Customs, Transport and Invoices.

Only seeing "Home"?

This means your login is active but no modules have been assigned to you yet. Contact your Excel operator. Permission changes usually appear within a few minutes.

4. The Home dashboard

When you log in, Neo opens the Tracking Portal Dashboard. It has four main areas:

- **Map:** vessel, aircraft and truck icons show where your shipments are. Switch between Map and Satellite views, zoom in and out, or open the map in full screen.
- **Tracking list:** a grid of your shipments below the map, showing the job number, goods description, origin, destination, ETD/ETA, a progress bar and the latest status.
- **Quick-filter tiles:** shortcuts on the right, such as Departing This Week, Arriving This Week and In Transit. Click a tile to filter the list (and the map).
- **Statistics:** charts such as airfreight weight, FCL TEU and LCL volume over time.

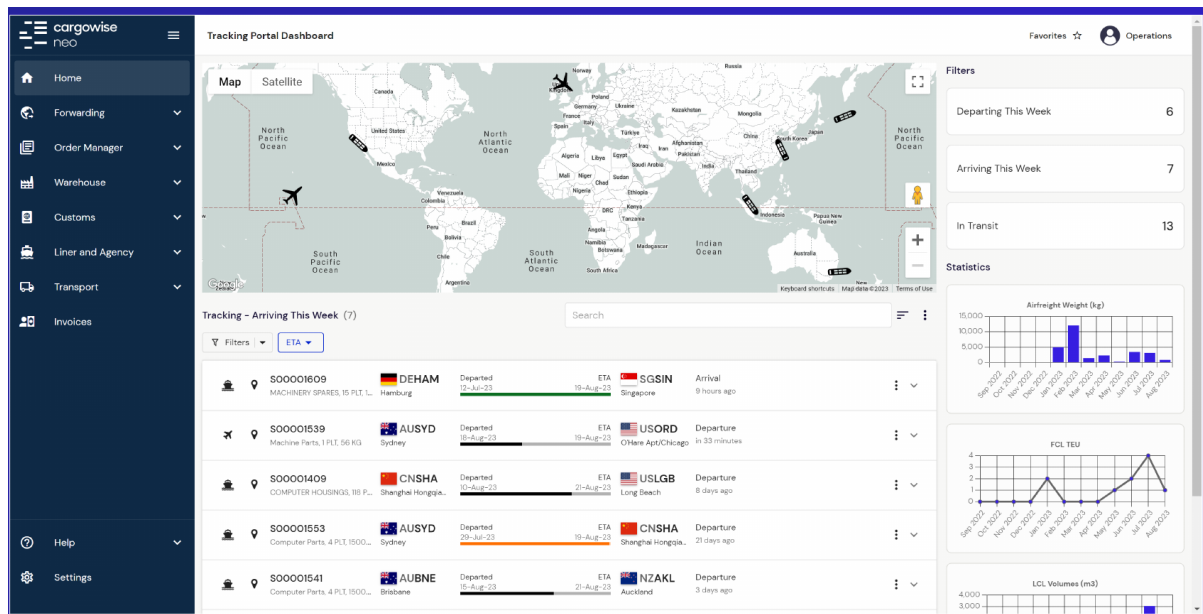


Figure 1 – The Neo Tracking Portal Dashboard (source: WiseTech Global Neo preview, demo data)

Use Favorites (☆) to save pages you use often.

5. Tracking your shipments

5.1 Understanding the map

This is the biggest change from Logixboard and the one clients ask about most.

	What the map shows
Logixboard	All active jobs from the last week that match your search filters.
Neo	Only the jobs on the current page of the grid below the map. By default, the grid is filtered to jobs that are In Transit.

This means the two systems may show a different number of pins, even for the same account. Nothing is missing. Neo is simply showing a different set of jobs.

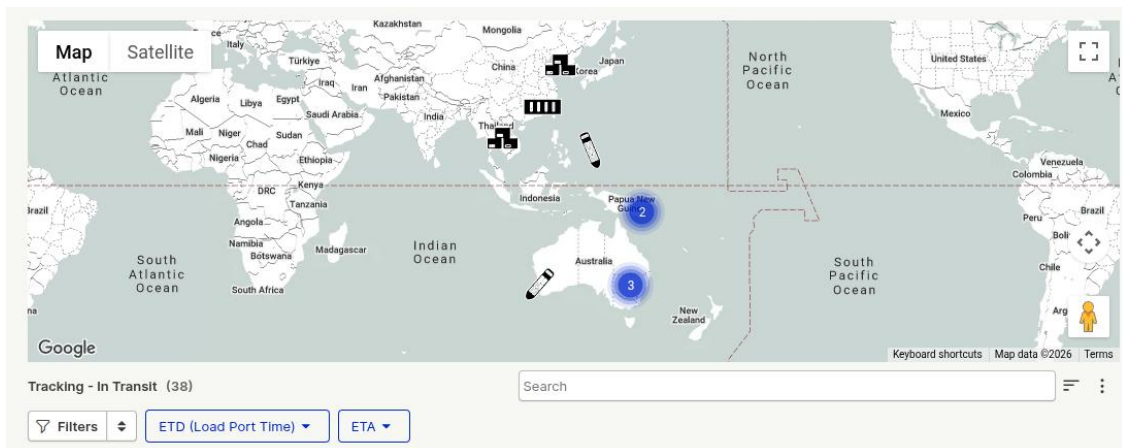


Figure 2 – Excel's Neo map showing "Tracking – In Transit (38)", with filters and ETD/ETA sort options

5.2 Showing more jobs on the map

1. Scroll to the bottom of the tracking grid.
2. Find Items per page.
3. Change the value to 100. The map refreshes to show all jobs on that page.

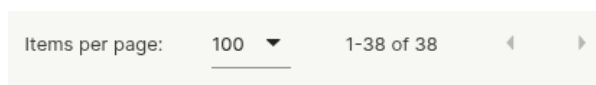


Figure 3 – Set Items per page to 100 to show more jobs on the map

5.3 Filtering, searching and sorting

- **Search box:** type a job number, house bill, reference or goods description.
- **Filters:** click Filters to add conditions such as origin, destination, mode or date range. Use the quick-filter tiles to change between In Transit, Departing This Week and Arriving This Week.
- **Date sorting:** use the ETD (Load Port Time) and ETA buttons to sort by departure or arrival.
- **Clustered pins:** a numbered circle on the map means several shipments are close together. Zoom in to separate them.

6. Opening a job

In Logixboard, clicking a job opened everything at once. Neo works in two steps:

1. **Click the job row** (or the ▼ arrow) to expand it. You will see a summary (job number, house bill, packages, weight, service level, goods description, pickup and delivery addresses, ports) and the Tracking History.
2. **Click the three dots (:)** on the right of the row to open the action menu, then choose View Details to see the full job.

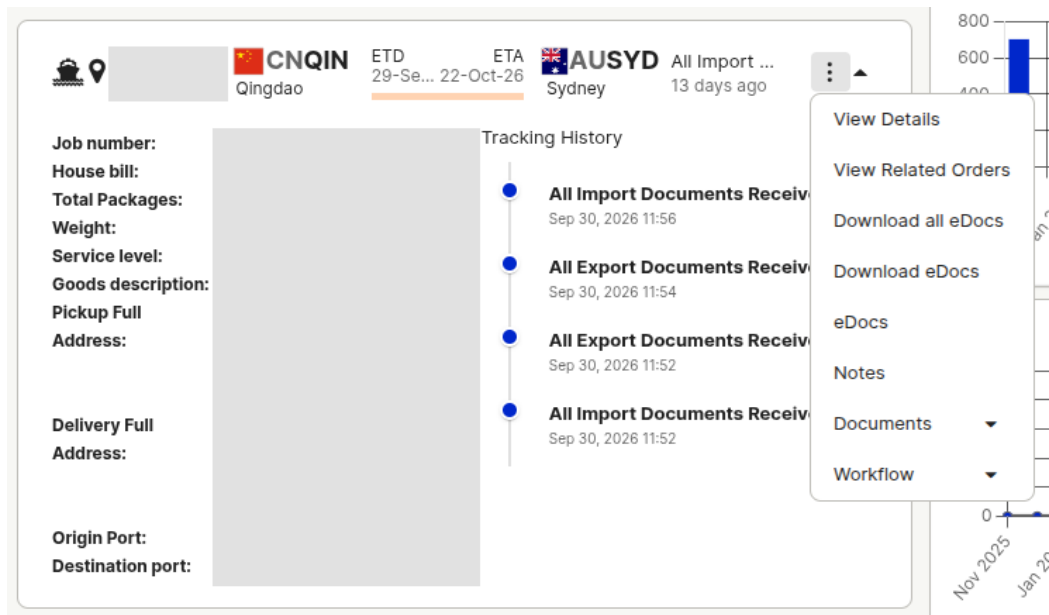


Figure 5 – An expanded job in Excel's Neo portal, with the : menu open (client details hidden)

Option	What it does
View Details	Opens the full job record. This is the closest match to opening a job in Logixboard.
View Related Orders	Shows purchase orders linked to this shipment.
Download all eDocs	Downloads every document published to you for this job in one go.
Download eDocs	Lets you choose which documents to download.
eDocs	Shows the list of documents attached to the job.
Notes	Shows notes that have been shared with you on the job.
Documents / Workflow	Further options for printable documents and job workflow, where enabled.

Milestones and events

The Tracking History shows two kinds of entries:

- **Milestones:** key points in the shipment's life, for example documents received, departed, arrived and delivered.
- **Events:** updates received by CargoWise from carriers, container tracking or customs, for example a customs hold.

7. Other modules

7.1 Shipments and Containers views

Under Forwarding, the Shipments and Containers pages show your jobs as a sortable, filterable list. These pages are useful for finding older or completed shipments that are not on the dashboard. Use Settings on the grid to choose which columns are shown.

Shipment ID	Goods Description	Shipper's Ref	Origin	Destination	Packs	Weight Measure	Volume Measure
S00001480	Machine Parts, NOS	UC021	GBMNC - Manchester, MAN, U.K.	USORD - O'Hare...	8	373,000 KG	6.312 M3
S00001464	Machinery Spares	UC078	GBLHR - Heathrow Apt/Lon...	USORD - O'Hare...	6	1,450,000 KG	6.912 M3
S00001458	Books	UC068	GBBHM - Birmingham, BIR, U.K.	USORD - O'Hare...	15	700,000 KG	1.680 M3
S00001539	Machine Parts		AUSYD - Sydney, NSW, Austr...	USORD - O'Hare...	1	56,000 KG	0.000 M3
S00001486	Machine Parts, NOS	UC012	CAMTR - Montreal, QC, Can...	USORD - O'Hare...	12	8,000,000 KG	5.122 M3
S00001535	Machine Parts, NOS		ITMXP - Malpensa Apt/Milan...	USORD - O'Hare...	1	400,000 KG	0.839 M3
S00001536	Machine Parts, NOS		ITMXP - Malpensa Apt/Milan...	USORD - O'Hare...	1	400,000 KG	0.839 M3
S00001542	Maple Syrup		CAMTR - Montreal, QC, Can...	USORD - O'Hare...	2	2,300,000 KG	10.00 M3
S00001381	Machine Parts		CATOR - Toronto, ON, Canada	USORD - O'Hare...	12	8,000,000 KG	5.122 M3
S00001548			CNSHA - Shanghai Hongqiao...	USORD - O'Hare...	150	5,000,000 KG	0.000 M3
S00001444	MACHINE PARTS, NOS	UCEDIT, UCED08	CAYTZ - Pearson International...	USORD - O'Hare...	10	7,650,000 KG	12.585 M3
S00001488	MISC. PARTS, NOS		HRHKG - Hong Kong, Hong K...	USORD - O'Hare...	37	584,000 KG	4.153 M3
S00001547	COMPUTER PARTS		DEDUS - Dusseldorf, NW, Ge...	USORD - O'Hare...	6	5,700,000 KG	0.000 M3
S00001551	GOLD MEDALS		JPTYO - Tokyo, JS, Japan	USORD - O'Hare...	10	300,000 KG	0.000 M3

Figure 6 – Shipments view (source: WiseTech Global Neo preview, demo data)

7.2 Order Manager

Remember: right-click

In Neo's Order Manager, right-click a line item to open the action menu. Left-clicking alone will not show the options you are used to in Logixboard.

Order Manager lets you view purchase orders and order lines and see which shipments they are linked to. Warehouse clients may also see inventory and outbound order functions, where enabled.

7.3 Documents

Documents that Excel publishes to a job (for example bills of lading, commercial invoices, packing lists and customs entries) are available from the job's : menu. Only documents marked for client viewing are shown.

If document upload has been enabled for your account, you can add documents to a job yourself:

1. Open the job and go to eDocs.
2. Click + (or drag and drop the file into the window).
3. Choose the document type and save. The document is filed directly against the job in CargoWise, where our operators can see it.

7.4 Invoices and statements

Where enabled, the Invoices menu lets you view and download the accounts receivable invoices raised to your organisation, and print account statements.

Job Invoice No.	Transaction Type	Invoice Date	Due Date	Fully Paid Date	Invoice Amount	Transaction Currency	Amount	Issuer
---	Invoice	19-Oct-22	19-Oct-22		1,500,0000	USD - United States Doll.	1,500,0000	Your United States Corp
500000540/A	Invoice	14-Apr-21	28-Apr-21		2,965,1600	AUD - Australian Dollar	2,965,1600	Your Australia Corp
500000544	Invoice	14-Apr-21	28-Apr-21		1,500,0000	AUD - Australian Dollar	1,500,0000	Your Australia Corp

Figure 7 – Invoices view (source: WiseTech Global Neo preview, demo data)

7.5 Reports and analytics

Logixboard's analytics do not have a direct one-to-one equivalent in Neo. However, Neo has a large library of CargoWise reports, including greenhouse gas emissions reporting. Where reports are enabled for you, you can choose a report, apply filters and options, and add the email recipients. The report is then emailed to them.

Excel is working to identify the Neo reports that best match the Logixboard analytics you used. If there is a report you rely on, please tell your Excel contact so we can prioritise it.

7.6 Bookings and quotes

Neo can support online quote requests and bookings by mode, container and route. These functions are only switched on by agreement with Excel. Please speak to your account contact if you are interested.

8. Contacting Excel Logistics

How to raise questions about a shipment

For now, please email your usual Excel Logistics operator or customer service contact and include the job number or house bill. Neo's in-portal messaging (eConversations) is being reviewed and is not yet in use for Excel clients. We will let you know if this changes.

Excel Logistics Pty Ltd

Phone: +61 2 9792 2802

For login, access or permission issues, contact your Excel account representative or operator.

9. Quick reference: “How do I...?”

I want to...	In Neo
See all my in-transit shipments on the map	Home → set Items per page to 100 at the bottom of the grid
See shipments arriving this week	Home → click the Arriving This Week tile
Find a specific job	Type the job number, house bill or reference into Search
See full job details	Click : on the job → View Details
See tracking history	Click the job row to expand it
Download all documents for a job	Click : → Download all eDocs
Upload a document (if enabled)	Click : → eDocs → + → choose document type
Act on an order line	Order Manager → right-click the line item
See vessel or flight position	Open the job's route / map view
Download an invoice (if enabled)	Invoices menu
Ask a question about a shipment	Email your Excel operator and quote the job number
Reset my password	Login page → Forgot Password

10. Troubleshooting and FAQs

The map shows fewer shipments than Logixboard did.

The Neo map only plots jobs on the current page of the grid, filtered to In Transit by default. Increase Items per page to 100, or change the filter (see section 5).

I can log in but only see “Home”.

Your login works but no modules are assigned to you yet. Contact Excel. Changes usually take effect within a few minutes.

I never received the password email.

Check junk or quarantine folders, then ask Excel to resend the password instructions. Make sure we have your correct email address.

My login is rejected.

Check that your email address matches the one Excel holds and that your password is correct (passwords are case-sensitive). If you are asked for an organisation code, use the one in your welcome email.

I clicked a job but cannot see everything.

Use the : menu and choose View Details.

Nothing happens when I click an order line.

Right-click the line item in Order Manager.

A document I expect is not showing.

Only documents marked for client viewing appear in Neo. Ask your operator to publish it.

A colleague has left our company.

Tell Excel straight away so we can disable their access.

Can I track without logging in?

Neo has an optional “quick track” function. Ask Excel whether it is available for your account.

11. References and further reading

This guide was compiled from the following sources:

- [CargoWise Neo product page](#)
- [WiseTech Global Neo preview \(PDF\)](#)
- [Navigating Neo in CargoWise](#)

Neo features and screens are updated regularly by WiseTech Global. The menus and options available to you depend on the access Excel Logistics has set up for your organisation.