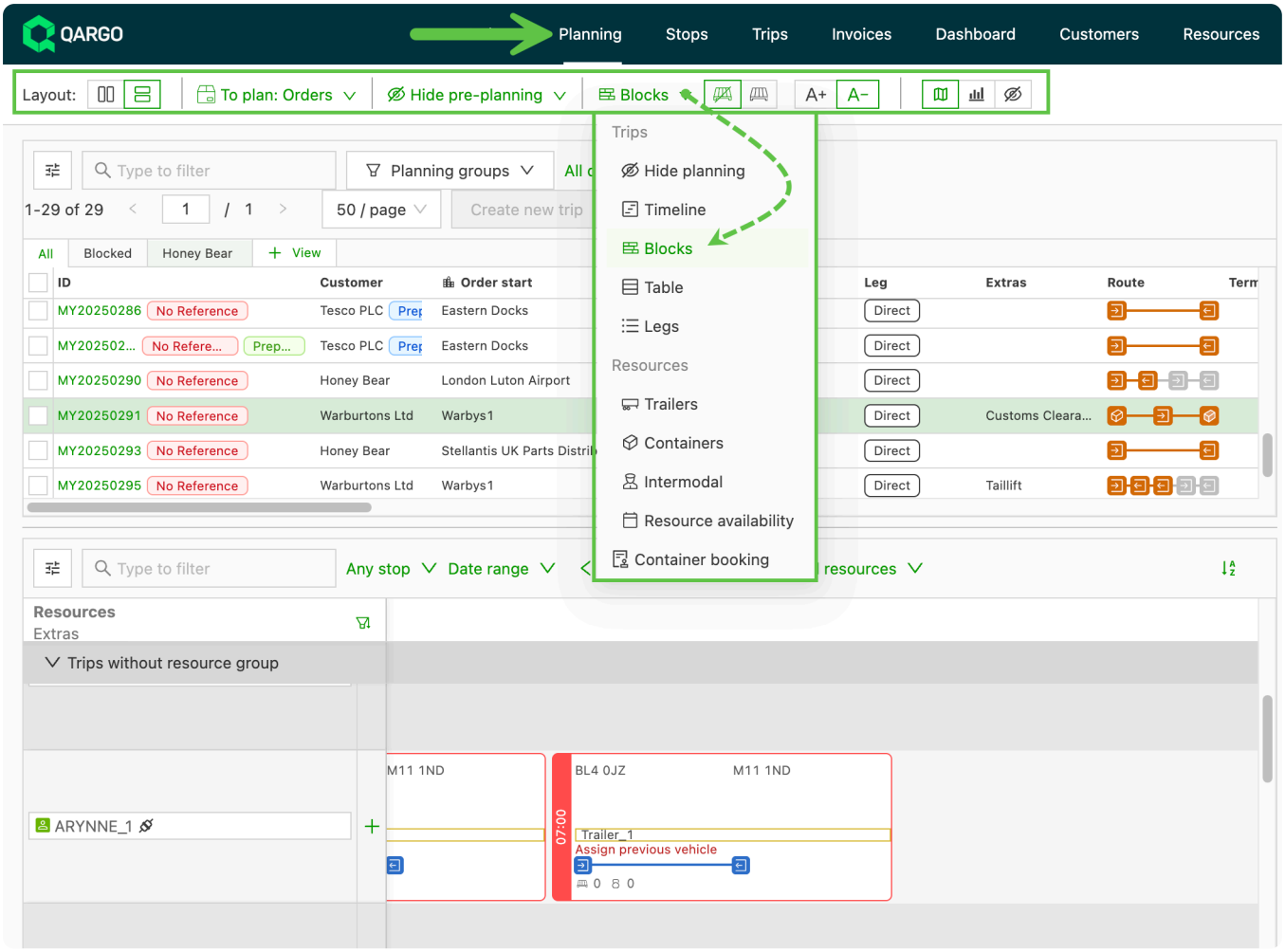
PLANNING - Planning views options

Overview of the various planning view options available on the Planning board, including pre-planning views and additional functions.

Updated 20 May 2026

To be able to start planning your orders, you can switch to the Planning page as shown below(also see 👉**Plan Trip**). The Planning page offers you multiple ways to visualise and manage your trips. Each view has been designed to cater to the unique needs and preferences of the user.

- Timeline View
- Blocks View
- Table View
- Legs View



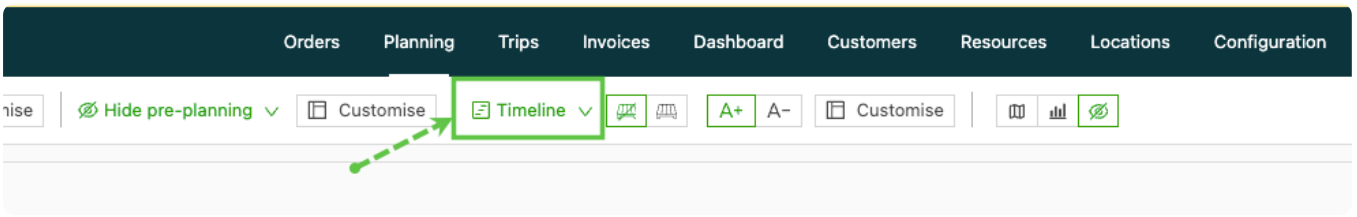
In addition to the Trip Planning Board Views, it is possible to view based on resources that might require specific planning, such as Containers, or Intermodal bookings.

There is also the option to customise the view based on what the individual user needs to see or work on.

Click HERE to see CUSTOMISATION options available in different views.

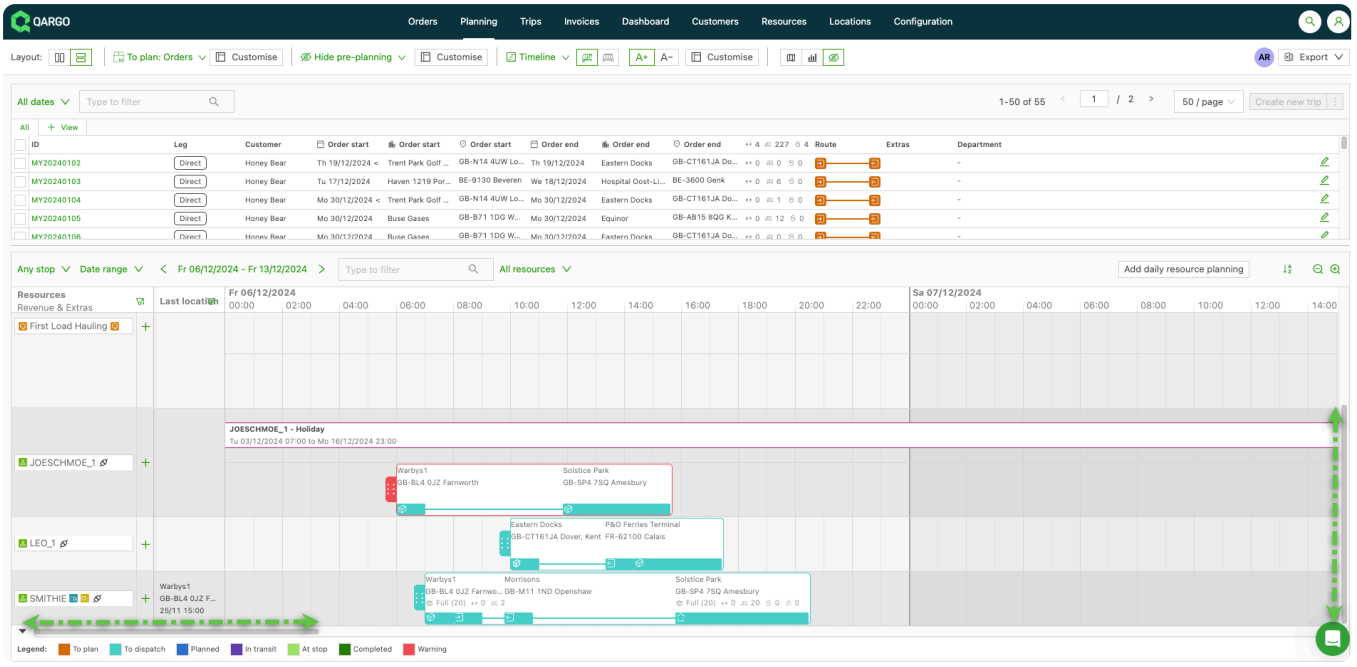
Timeline View:

The Timeline View provides a comprehensive chronological representation of all the trips that have been made. It can be used when you want to analyse the sequence and timing of your trips over a period.

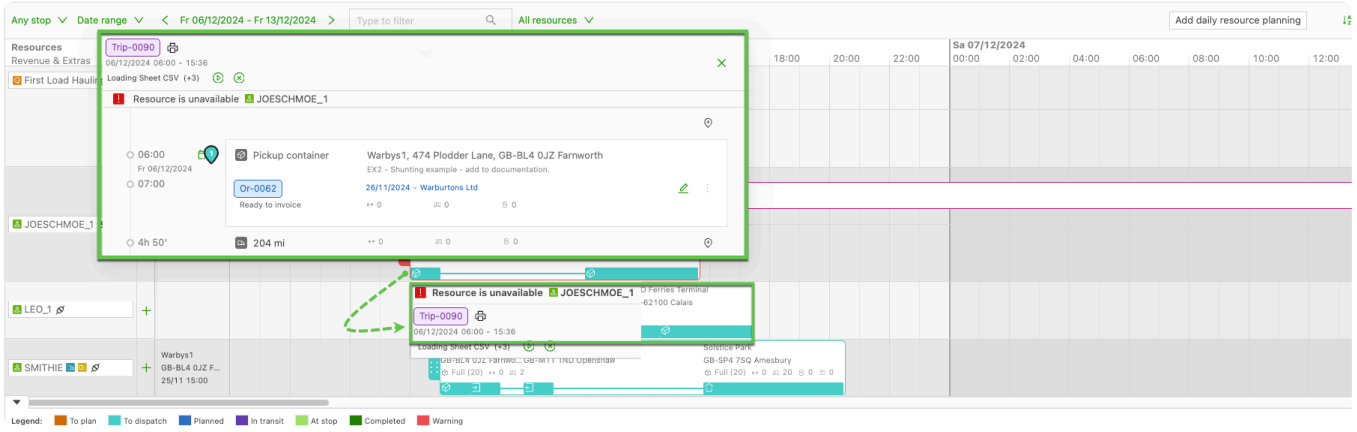


To navigate and use the Timeline View, follow these steps:

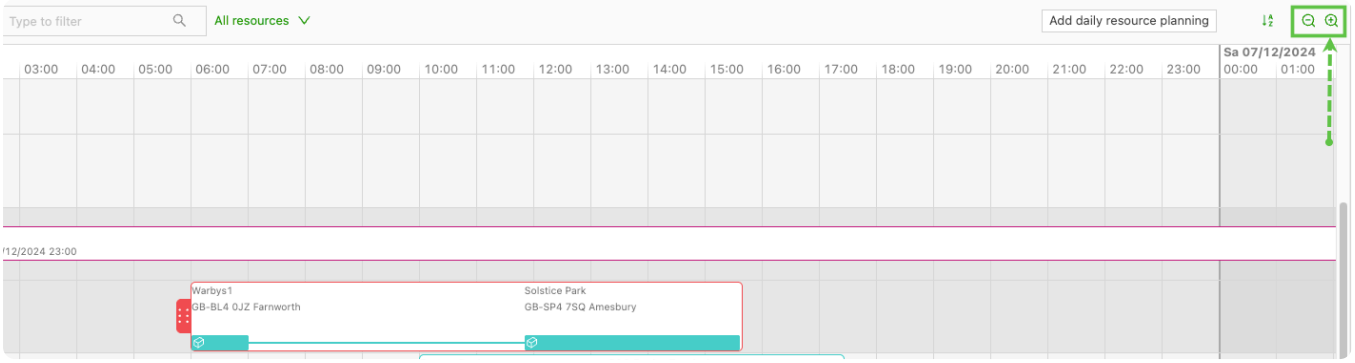
- Scroll horizontally or vertically to move through the timeline.



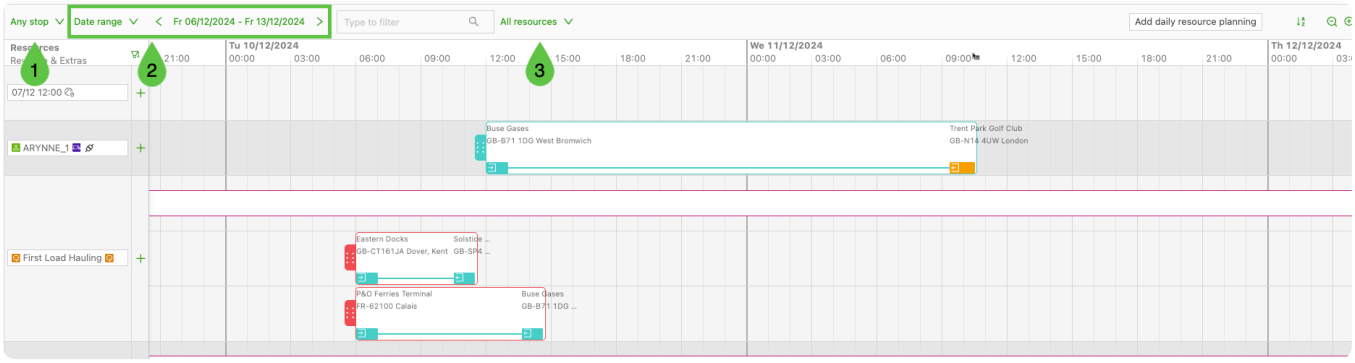
- Click on a trip or hover over to access detailed information about it.



- Use zoom controls, if available, to adjust the timeline's scale for better visibility.



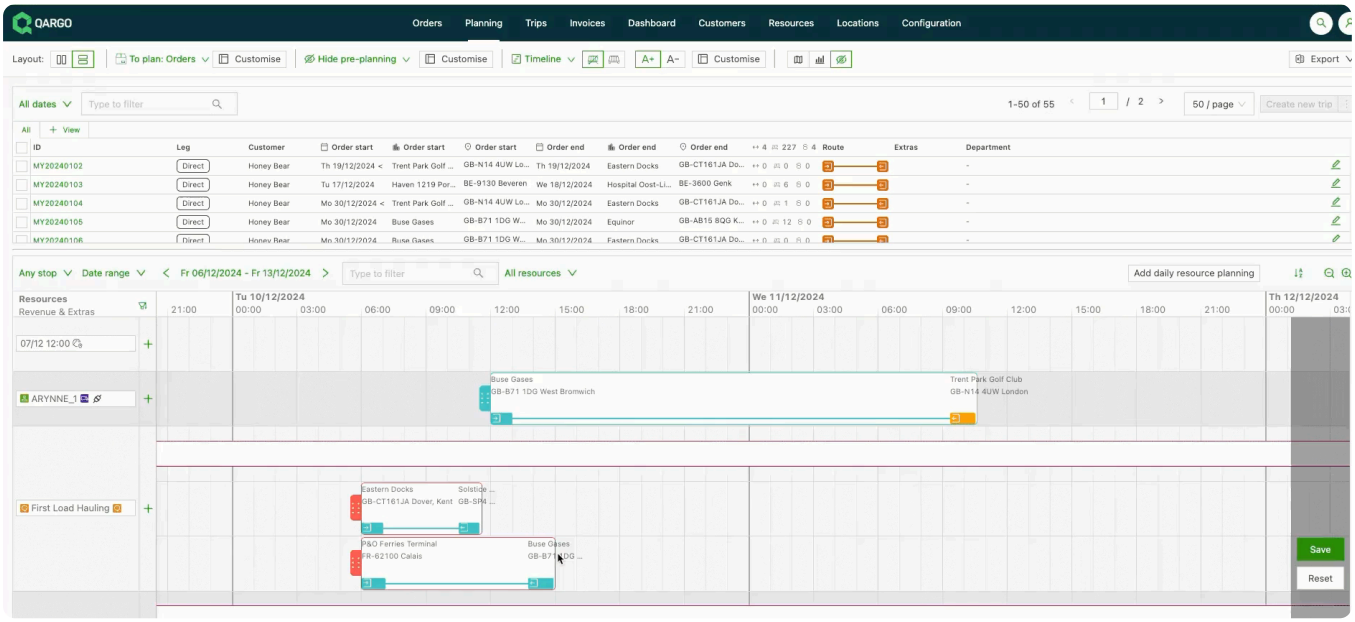
- Utilise filters, if provided, to narrow down the display based on specific criteria. You can select the time interval, date interval, filter on a specific resource, trip number, postcode or location and if applicable filter on a 🔮**Resource group** that you are responsible for.



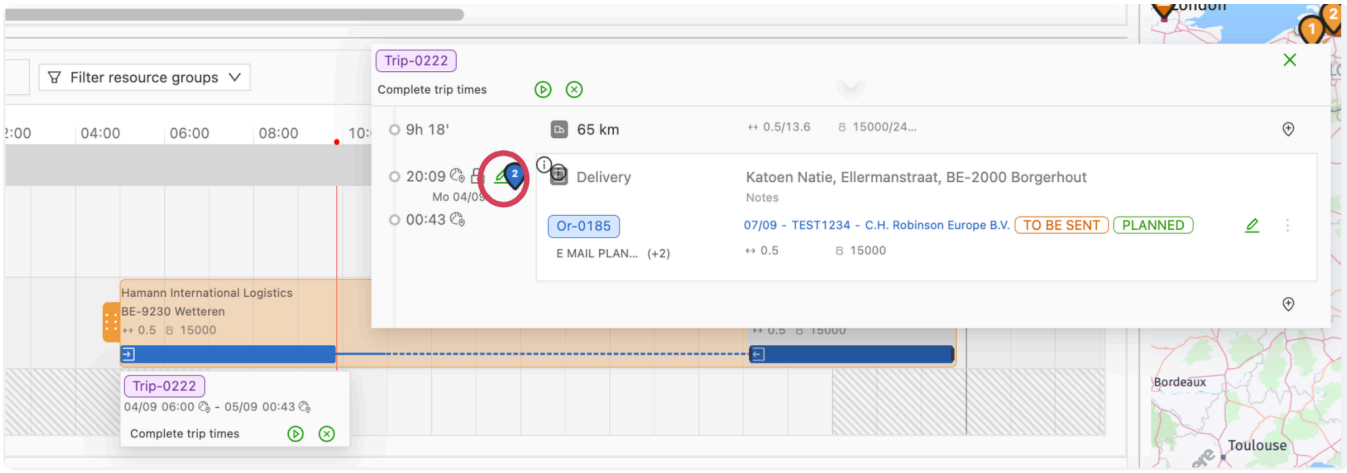
1. Select the time interval to view
2. Select the date range option and date range to view
3. Use filter option to search for specific resources, trip, postcode or location

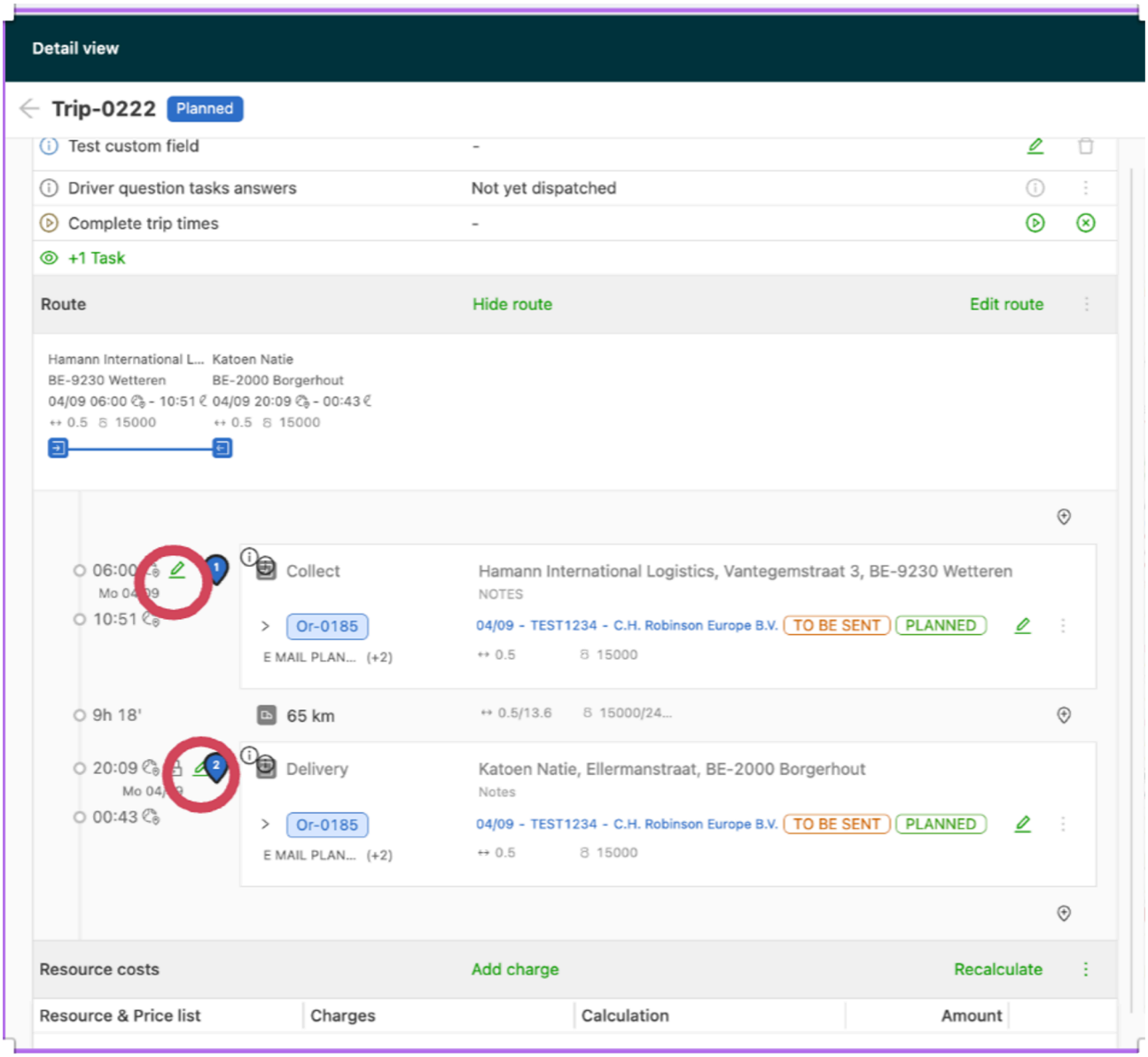
For a more comprehensive information about resource groups, please see: 🔮**Resource groups**

On the timeline view you can adjust the start and end times of your trip or stops by dragging the stop you wish to adjust to left or right as shown below. Once adjusted, click SAVE to update.



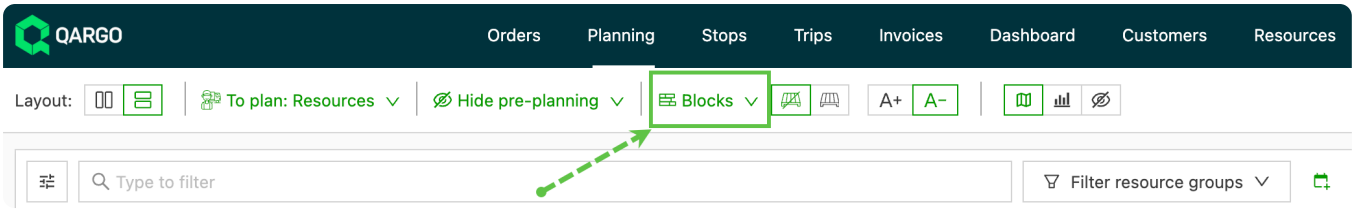
You can view the time details of your trip by hovering on the trip and can adjust the hour details also from the small overview pop-up or from the trip page.





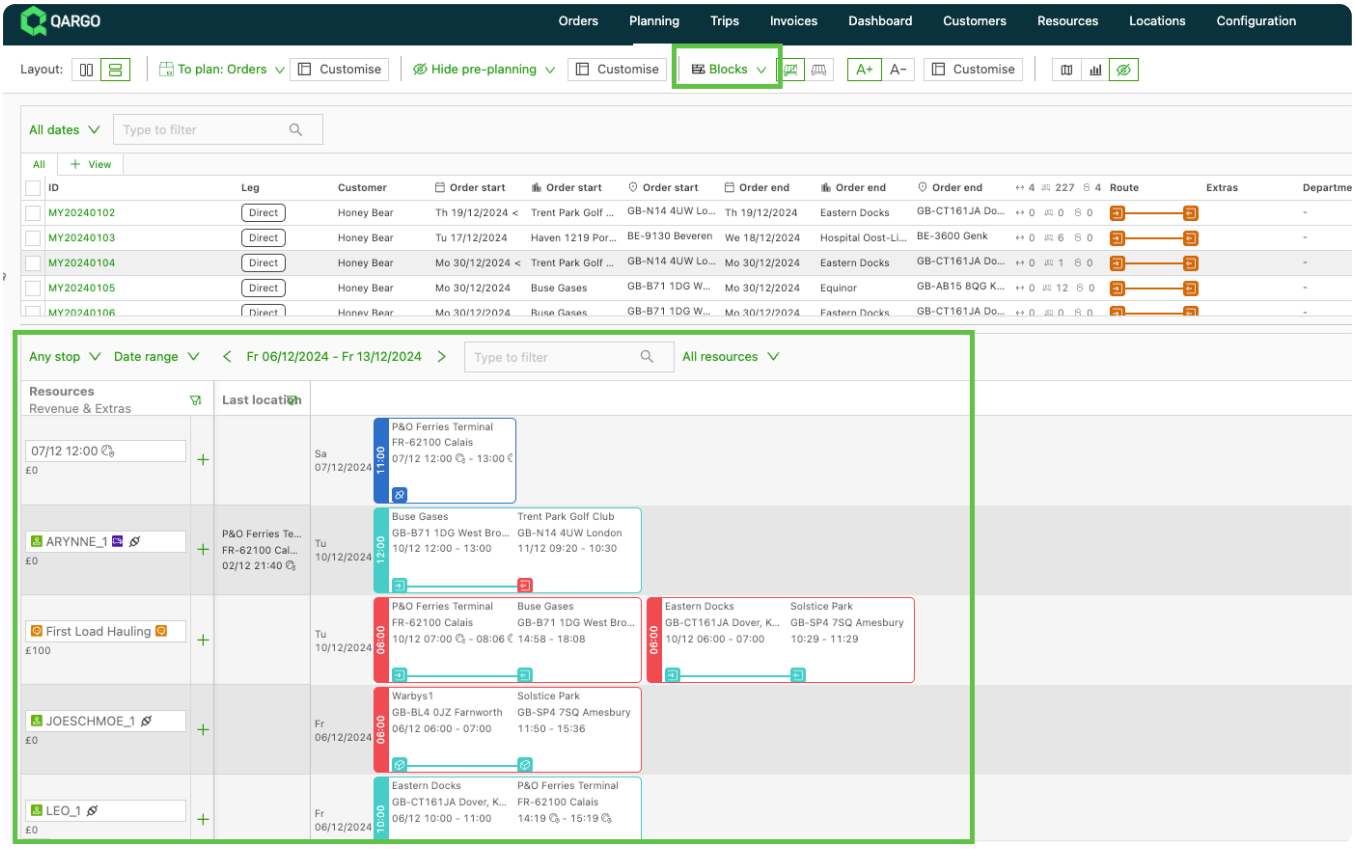
Blocks View:

In the Blocks View, the focus shifts from precise timing to a more visual and board-like representation of your trips.

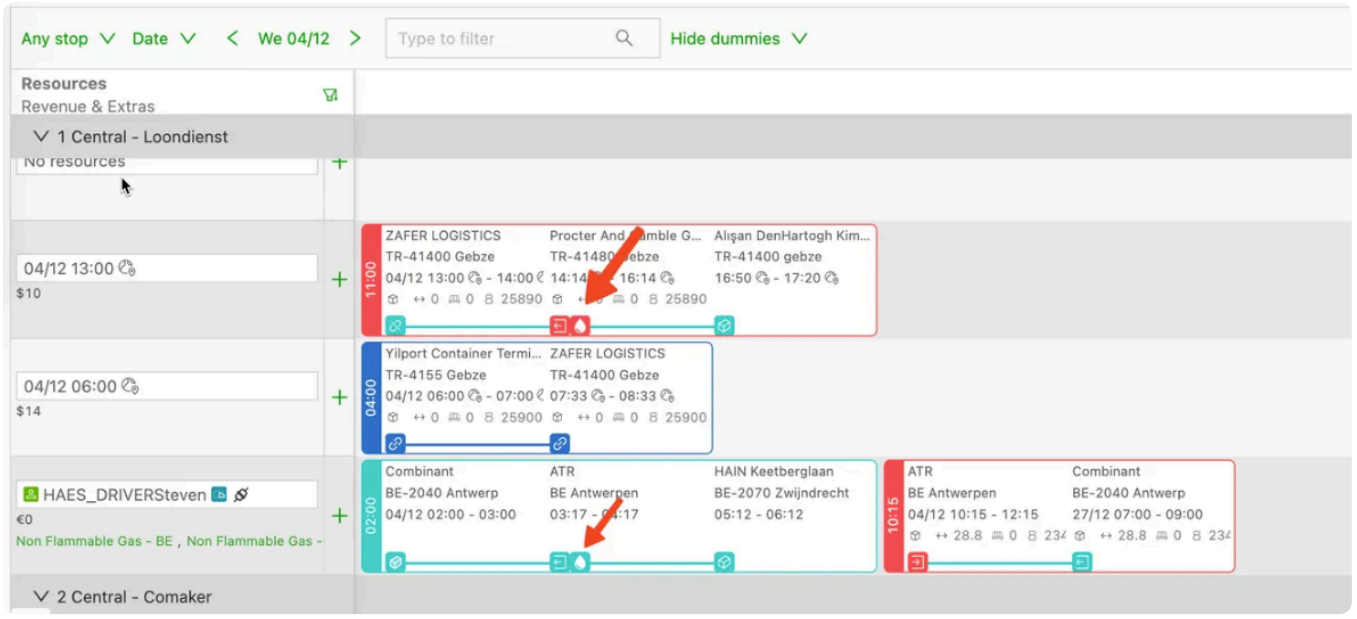


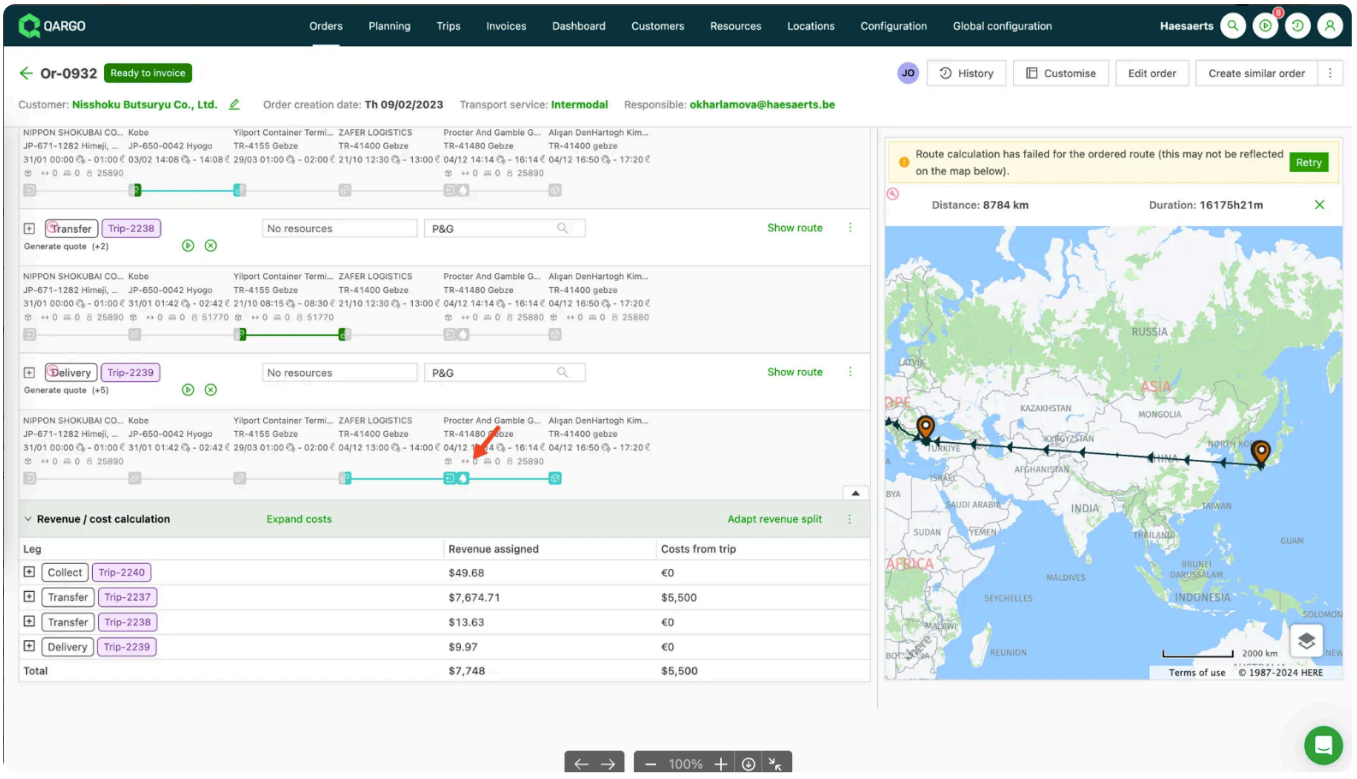
This view is used for a quick overview of your trips and their statuses. To effectively utilise the Board View, follow these guidelines:

- Trips are organised as cards on a virtual board.



The ***Blocks View*** on the planning board will show all relevant stop activities on a trip. The order and trip route will display to show the individual stop actions to give improved transparency, this is particularly useful where multiple actions are scheduled at the same stop, ie: Delivery / Collect.

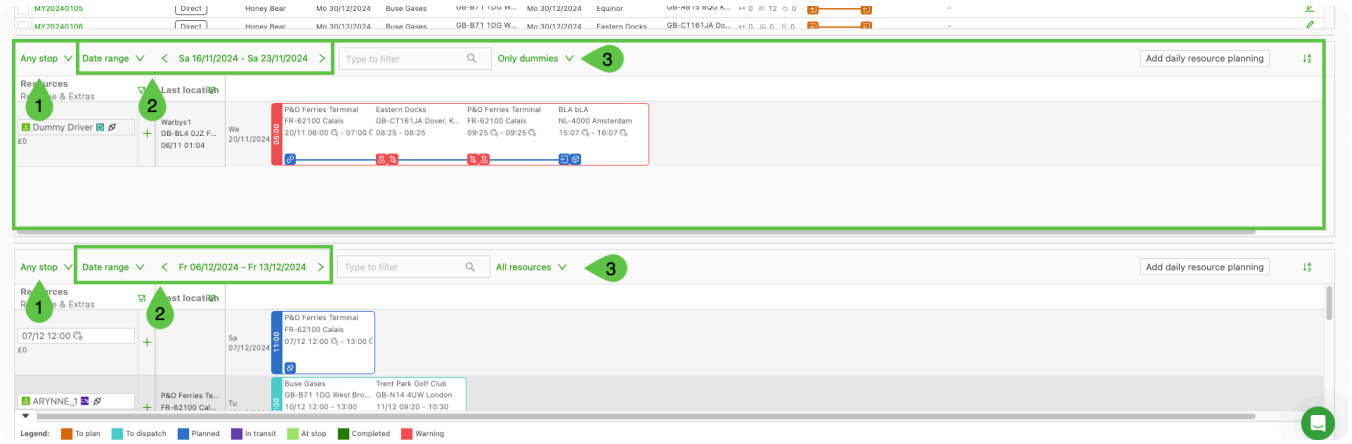




- When **Planning trip** with the orders, drag and drop trip stops to rearrange or update their status. The same can be performed from the trip page via the ***'edit order'*** option.

▶ https://www.loom.com/embed/1e293f6f7b7d4dcfbbc046454a3b68bc

- Use filters to narrow down the display options based on specific criteria.



1. Select the time interval to view
2. Select the date range option and date range to view
3. Use filter option to search for specific resources or resource group, trip, postcode or location

📚 Use the customise option to display additional details in the **Timeline & Blocks views**.

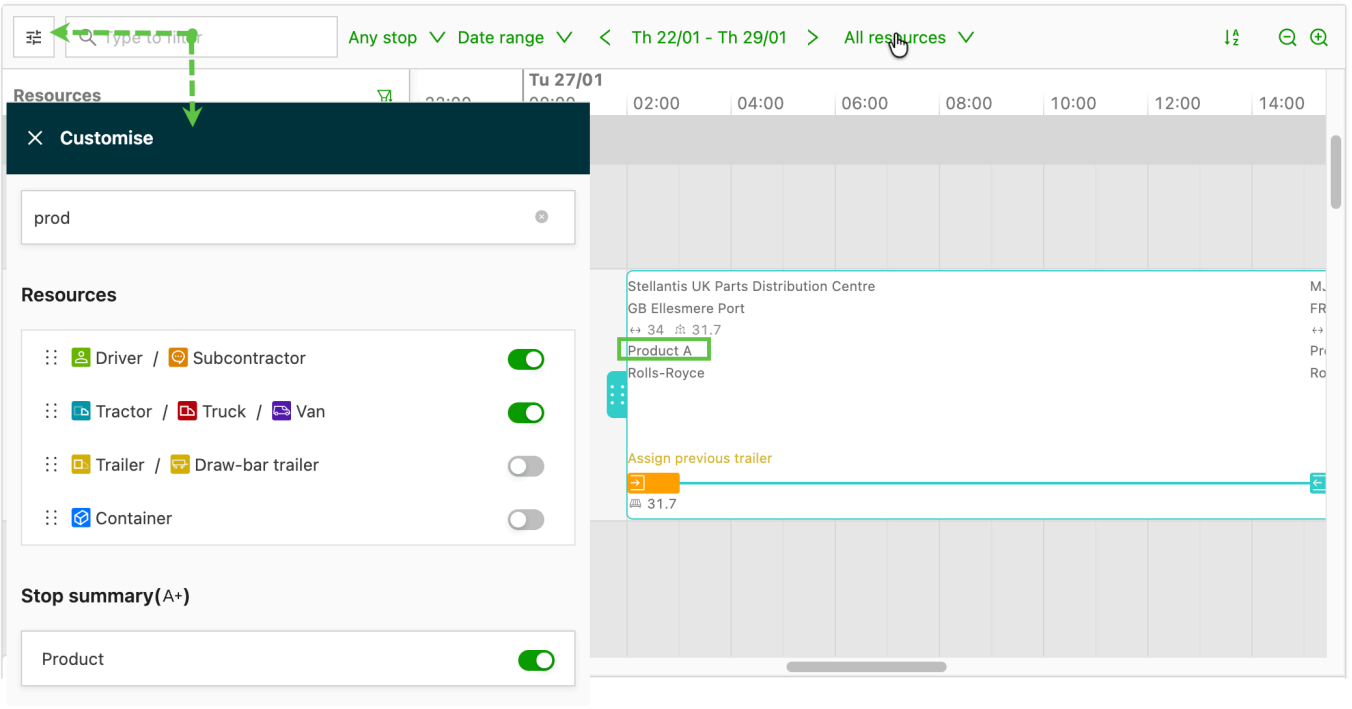
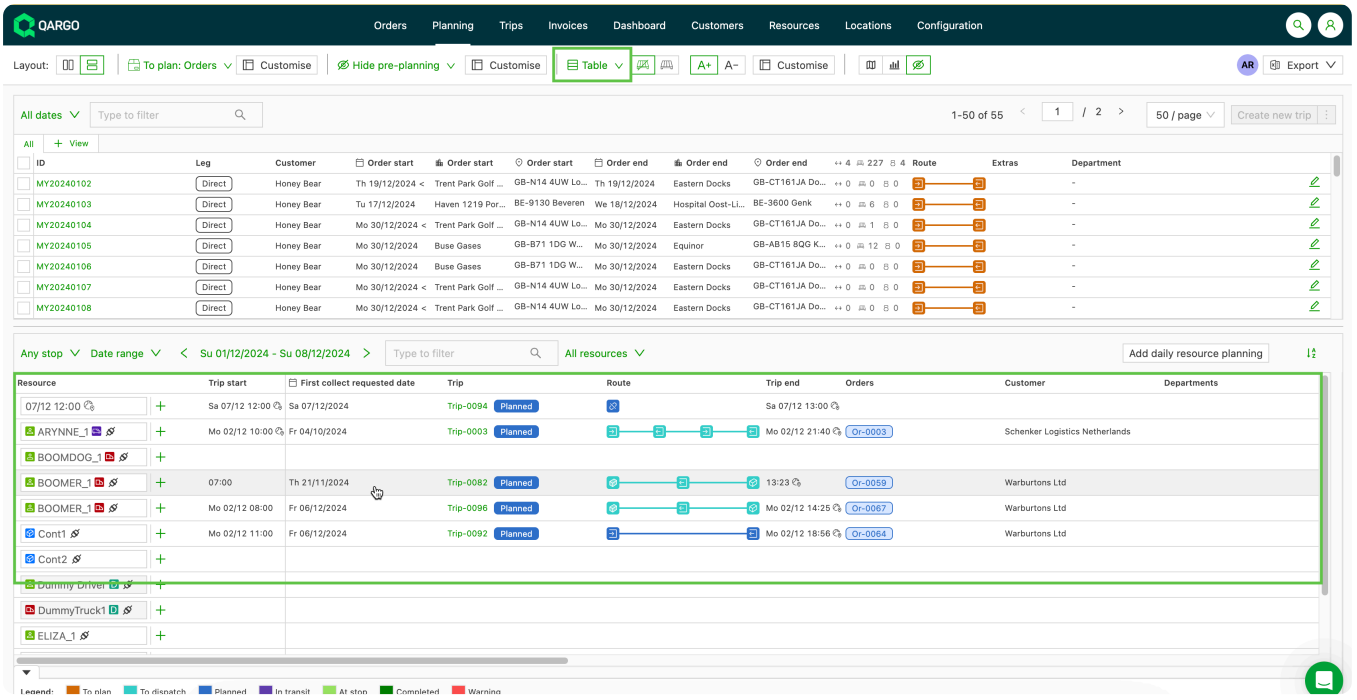


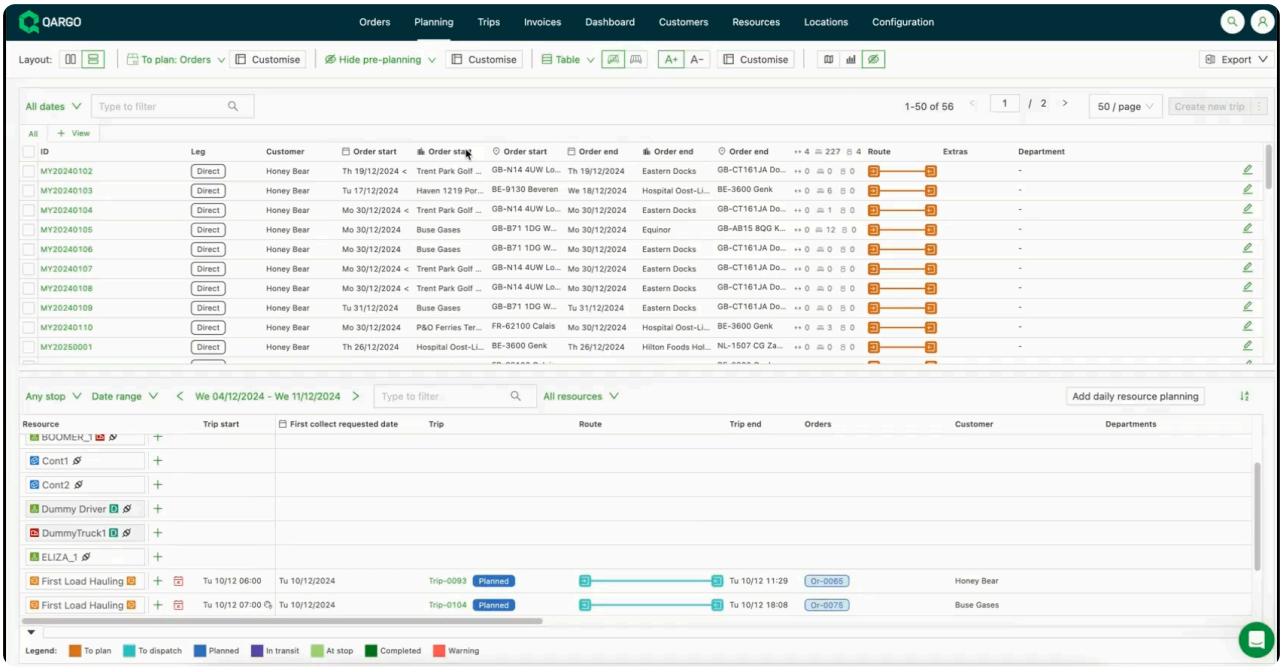
Table View

This new view houses a compact table form of the planning board. This view will help transportation companies with a large planning keep a tidy overview and the columns helps to scan the information quickly.

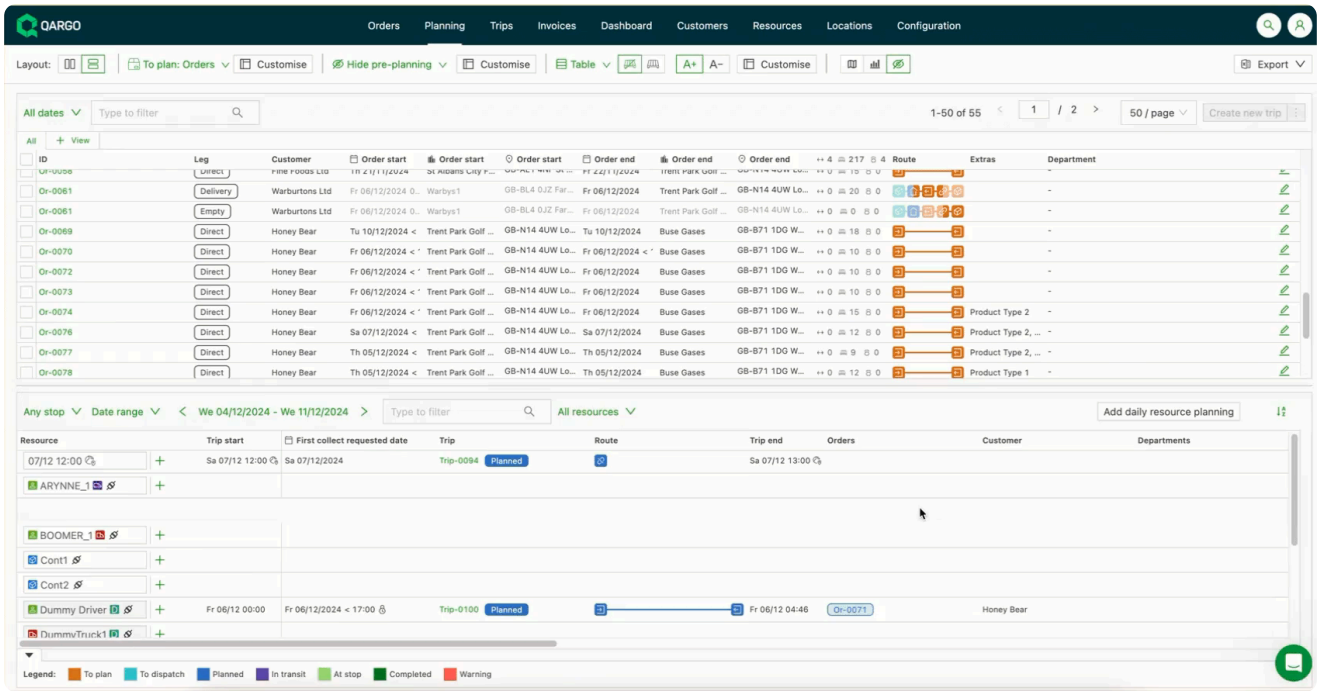


Each row represents a trip or a reservation and most of the drag and drop interactions are supported.

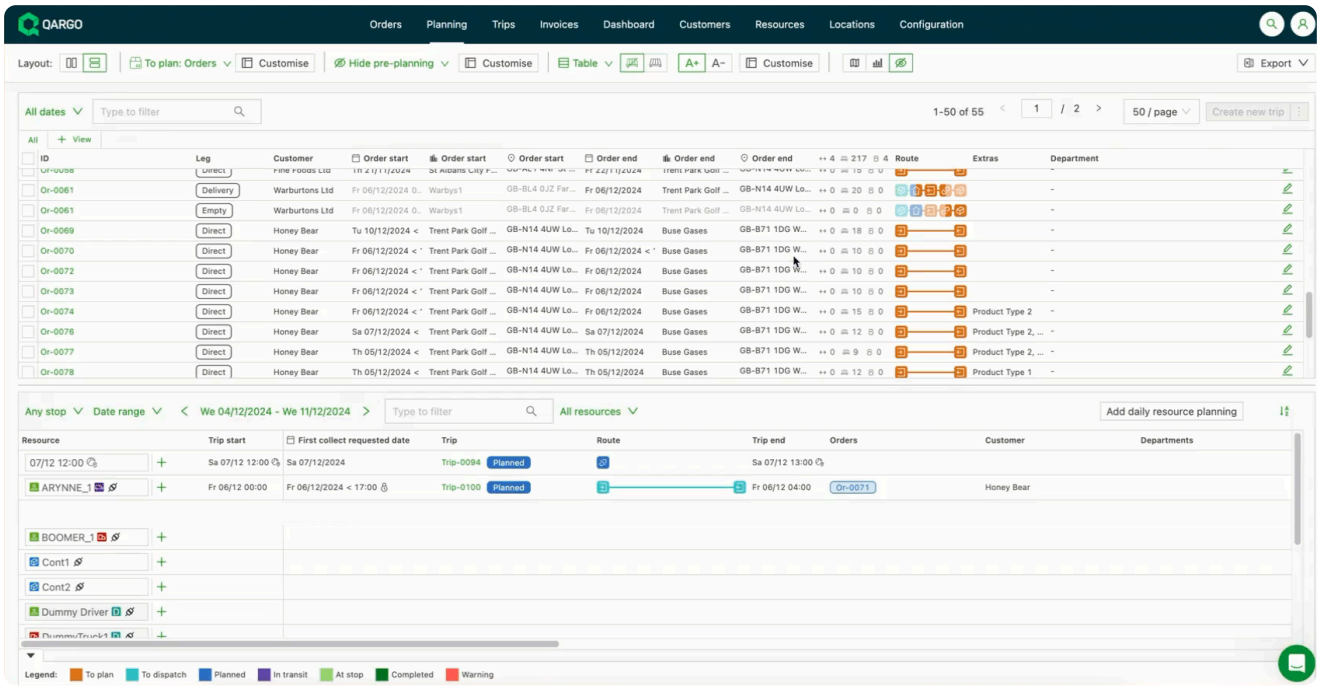
- Order to plan → Trips: table: Create a new trip or add to an existing trip.
  - Create trip: User can set a start timestamp
  - Add to existing trip: User can drag the stops into the planned shipment and reorder the stops.



- Resources → Trips: table: Assign resource(s) (similar to other views)



- Trips: table → Order to plan: Unplan the trip



- Trips: table → Trips: timeline/ blocks: Replans the shipment
    - This is only possible if the pre-planning board is enabled.

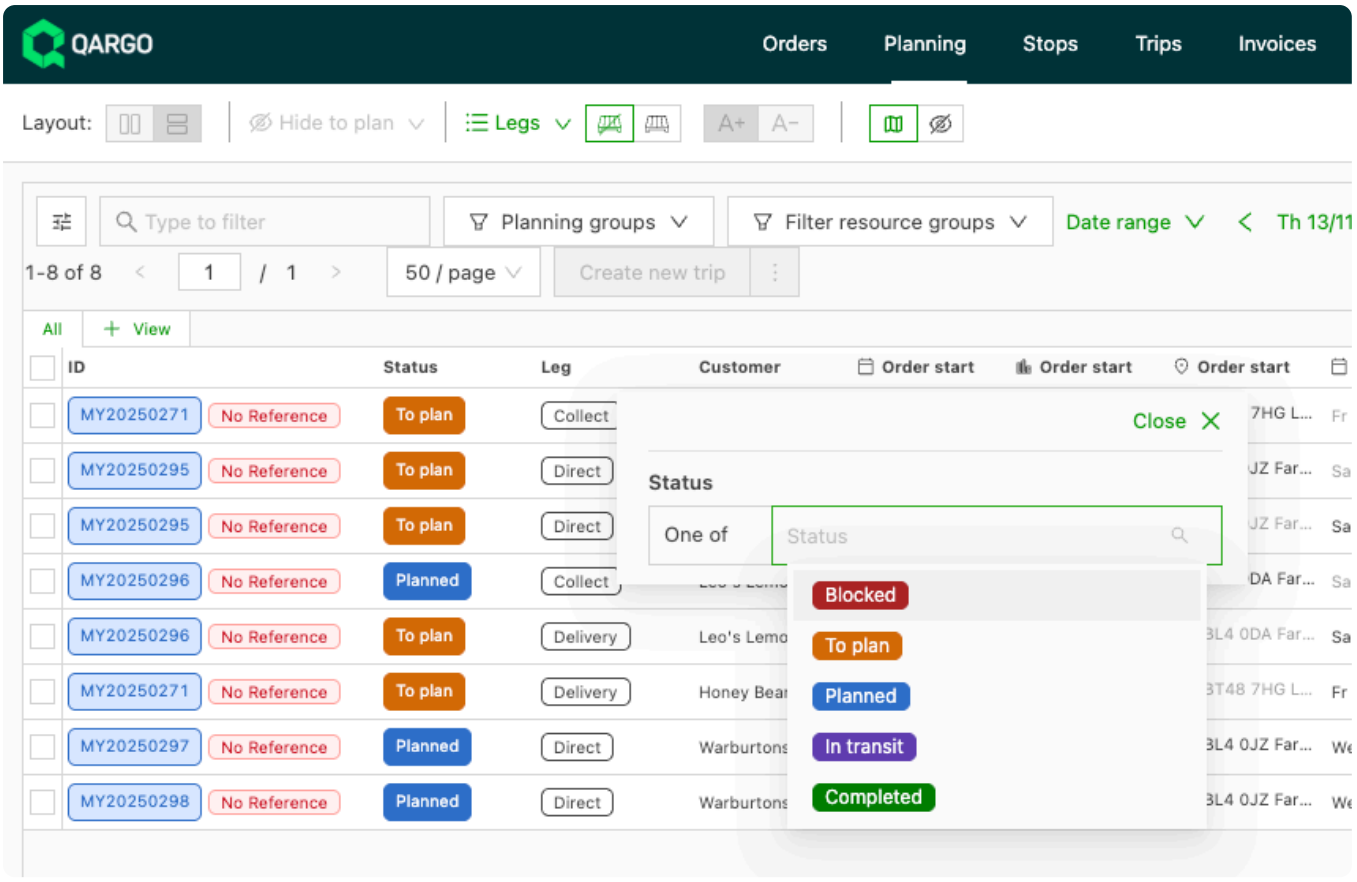
Leg View (Orders Overview):

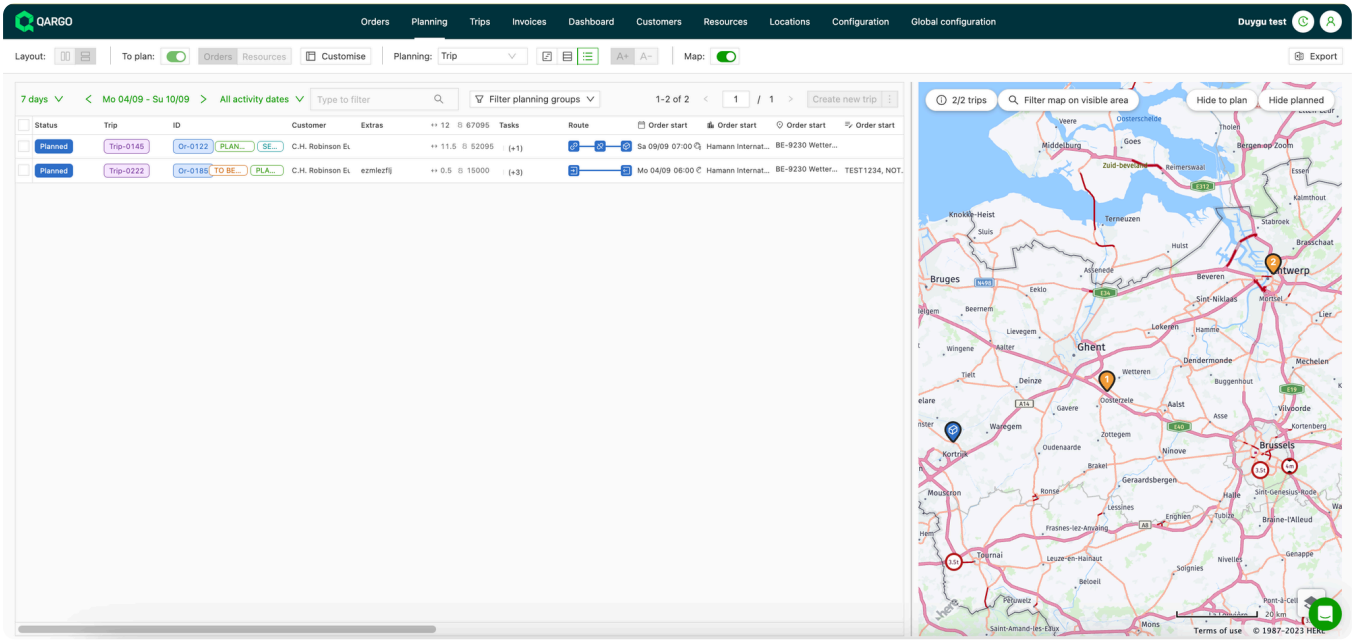
The Leg View presents a consolidated list of all the orders, with corresponding status:

- To Plan
- Planned
- In Transit
- Completed

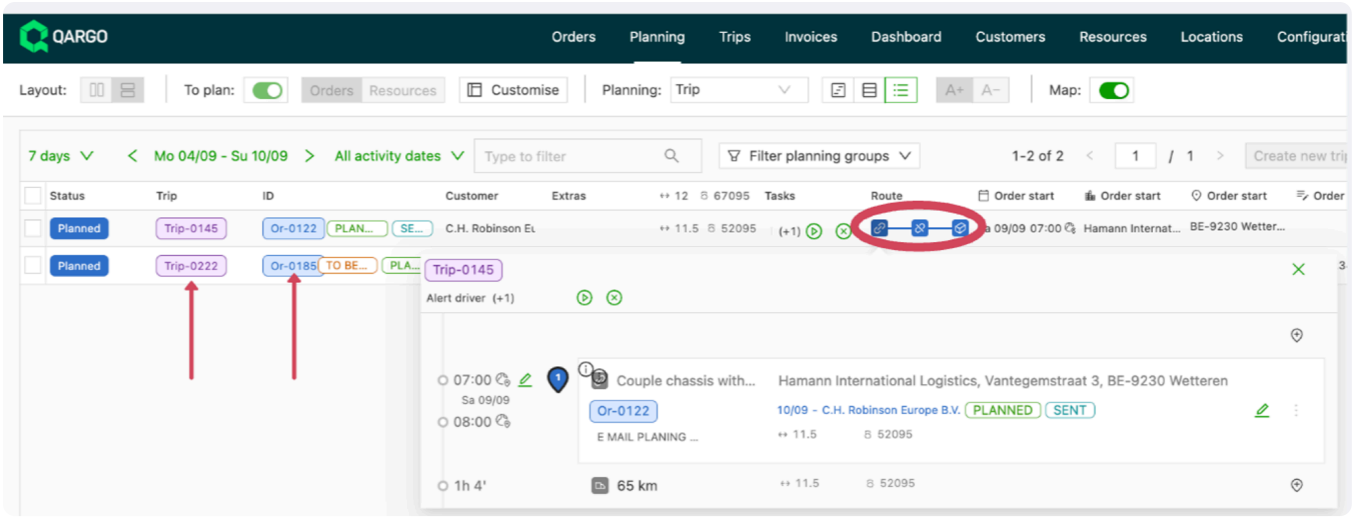
This view is ideal when you want a holistic understanding of the underlying orders driving your trips. To make the most of the Legs View, follow these steps:

- Scan through the list to see all orders associated with trips. You can filter on the status of the orders, use personalise option to broaden or limit the information that you would like to see per order/trip, visualise these on the map:



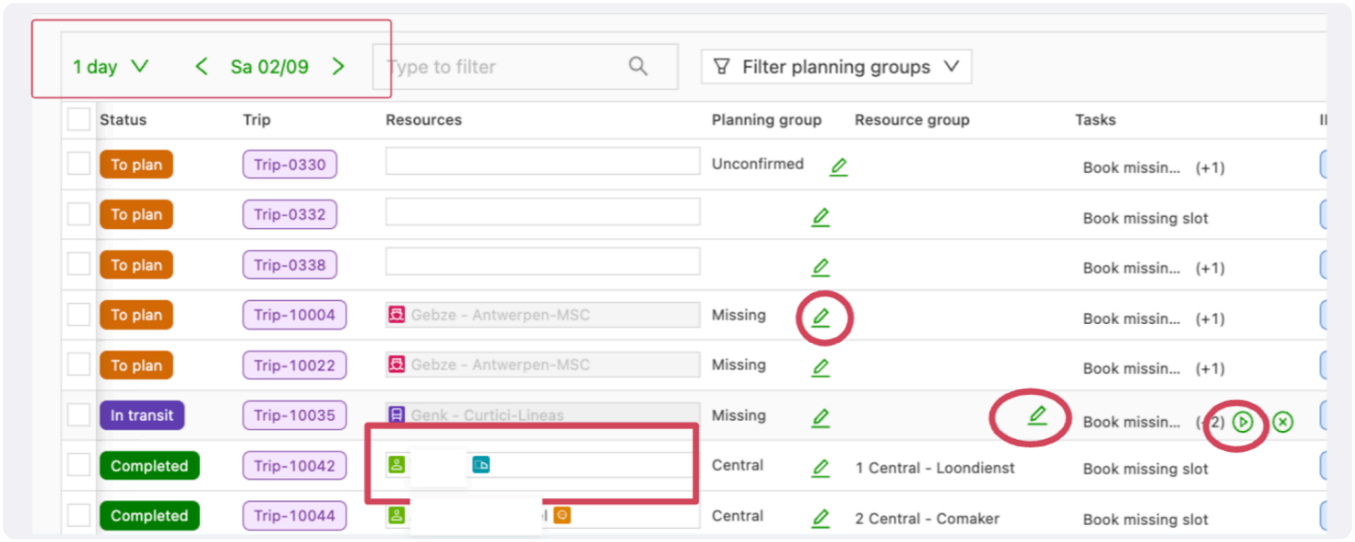


- You can hover over the route view to see more details or click on an order number or to the trip number to access to more details:

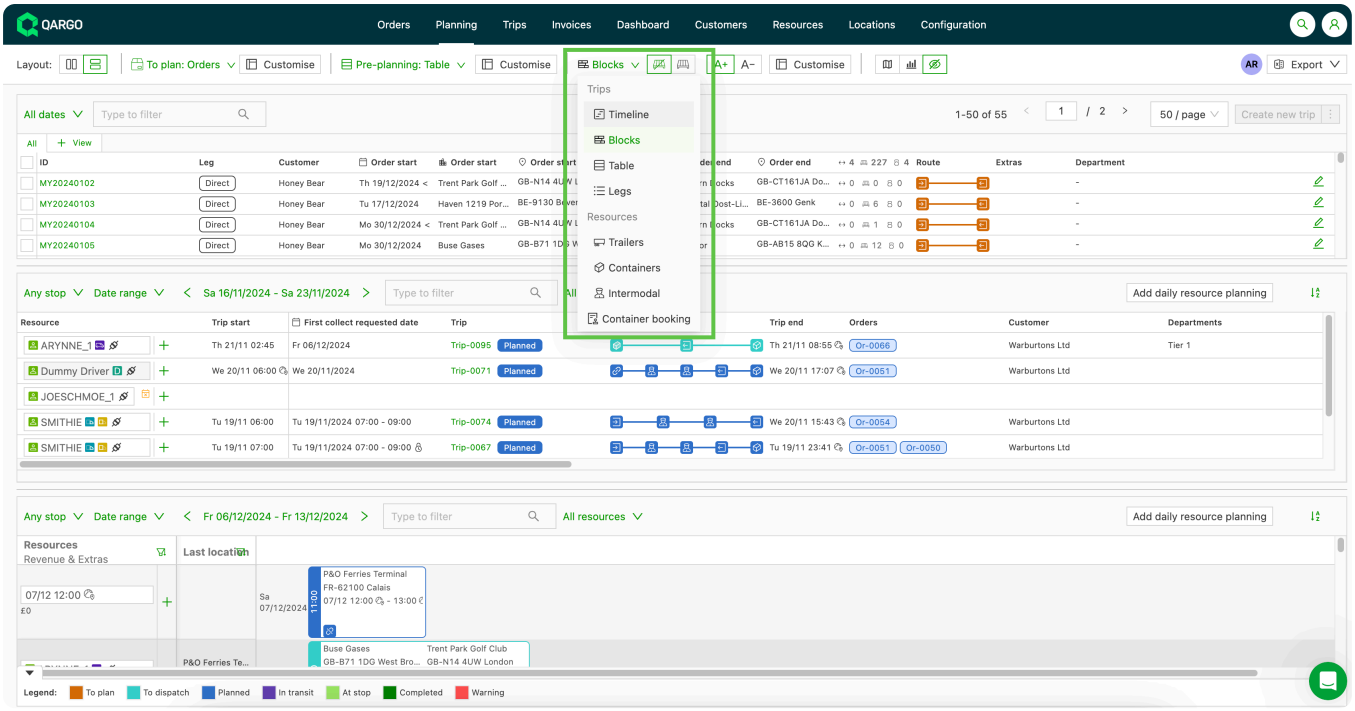


From the Leg view you can also

- adjust the resources
- adjust planning groups
- complete tasks
- Use filters per a time interval

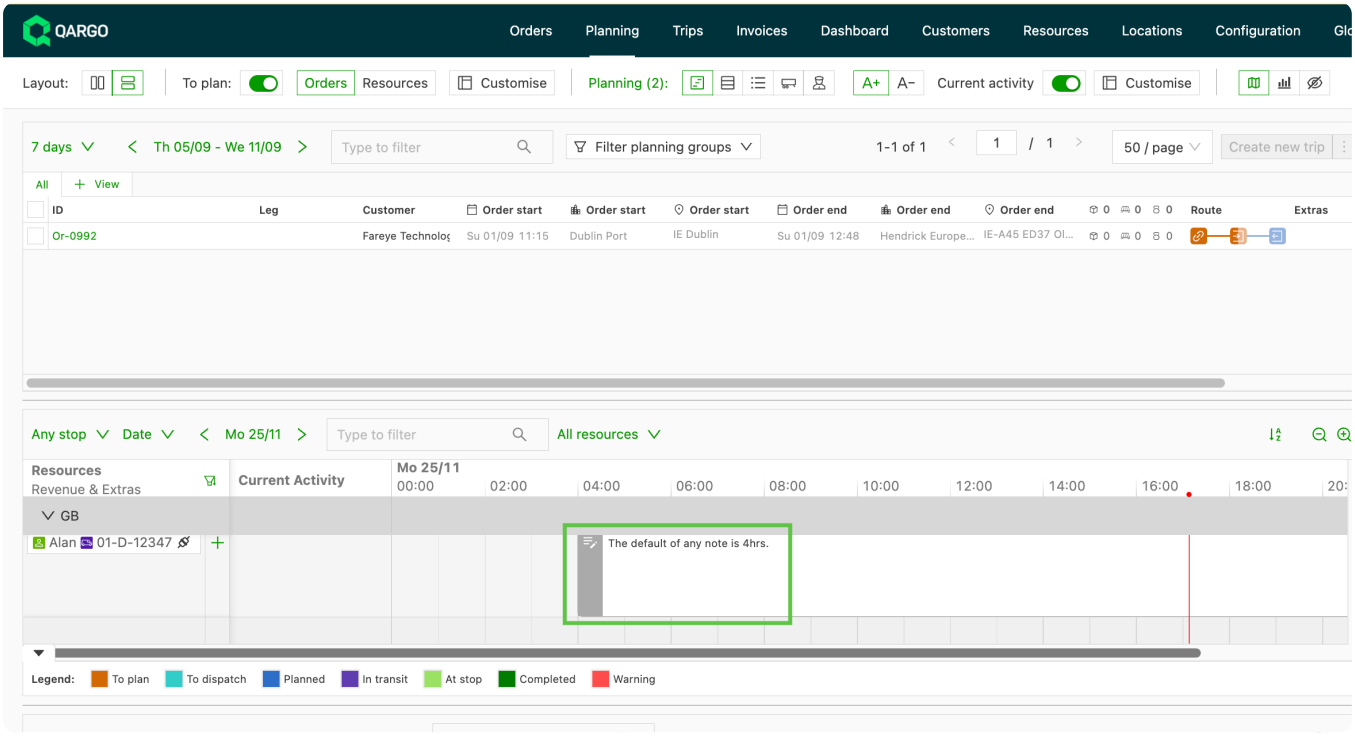


Switching between planning views based on your current task and preferences is possible, simply select the new view in the drop down menu. Each view offers a unique perspective to help you efficiently manage your trips and orders.

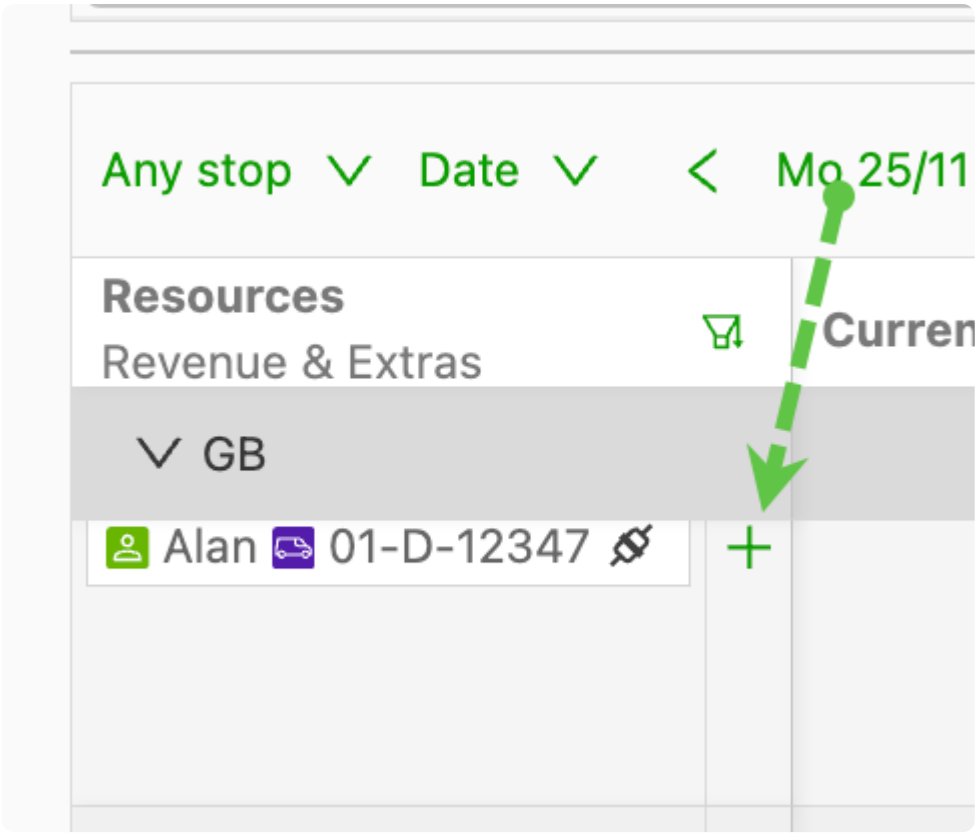


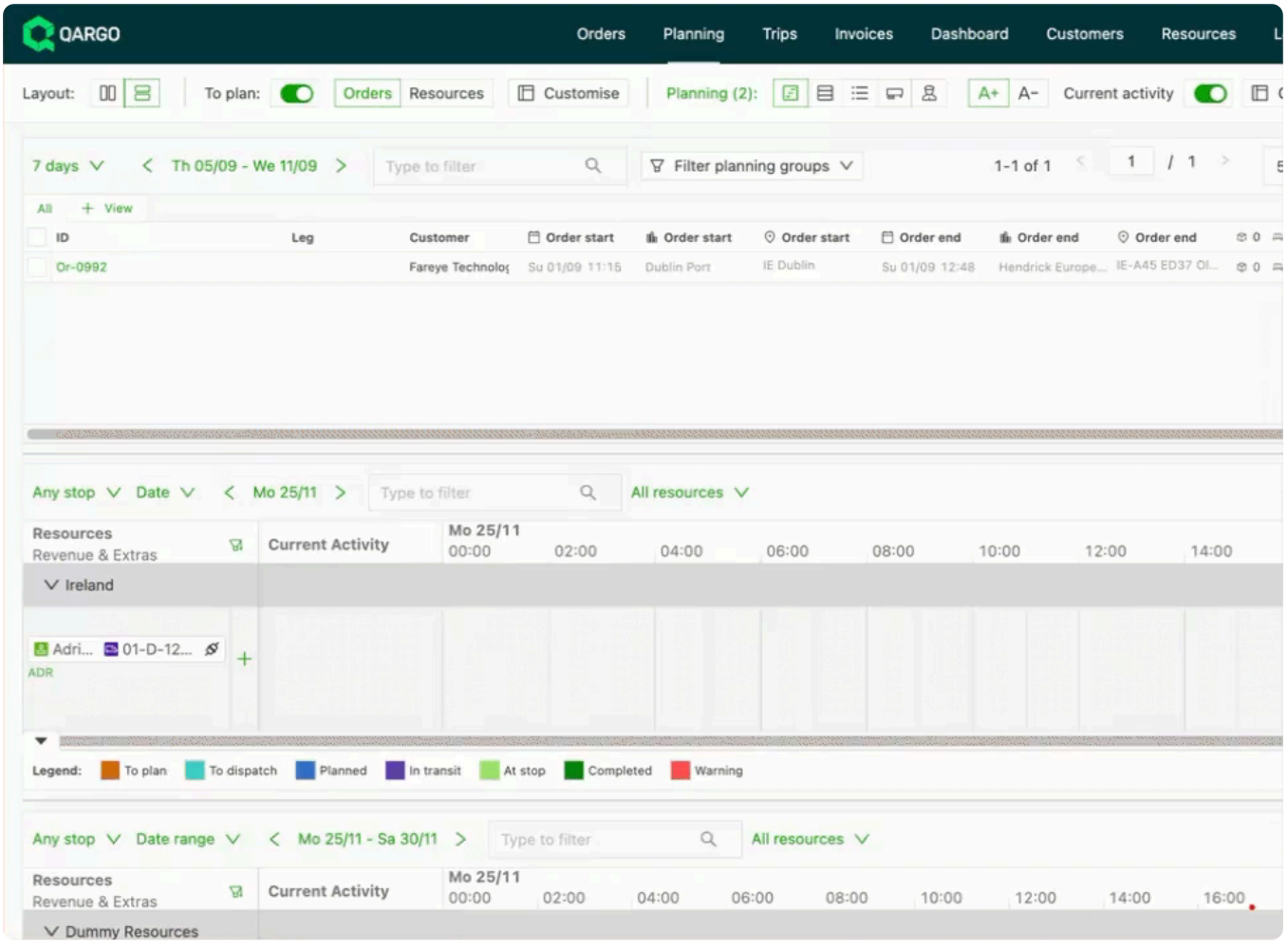
Add a Note

On both the Timeline and Board views, it is possible to 'Add a Note' which can be used to give visibility of critical information associated to a resource. The note visibility will default to a 4hr time limit, however this can be manually adjusted. There is also the option to select multiple dates to show the note.



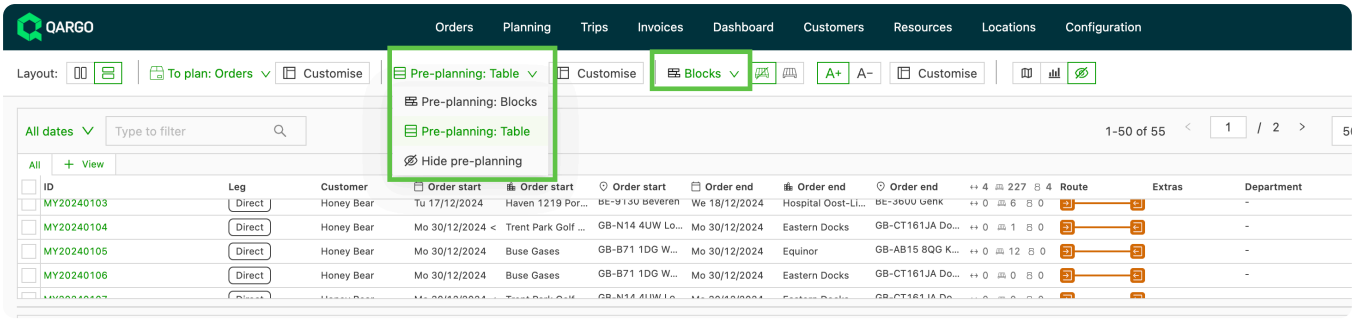
To create the note, click the '+' next to the resource, or alternatively right click anywhere in the row associated to the resource.


Any stop
Date
Mo 25/11
Resources
Revenue & Extras
Curren
GB
Alan
01-D-12347


QARGO
Orders
Planning
Trips
Invoices
Dashboard
Customers
Resources
Layout:
To plan:
Orders
Resources
Customise
Planning (2):
A+
A-
Current activity
7 days
Th 05/09 - We 11/09
Type to filter
Filter planning groups
1-1 of 1
ID
Leg
Customer
Order start
Order start
Order start
Order end
Order end
Order end
Or-0992
Fareye Technolo
Su 01/09 11:15
Dublin Port
IE Dublin
Su 01/09 12:48
Hendrick Europe...
IE-A45 ED37 OI...
Any stop
Date
Mo 25/11
Type to filter
All resources
Resources
Revenue & Extras
Current Activity
Mo 25/11
00:00
02:00
04:00
06:00
08:00
10:00
12:00
14:00
Ireland
Adri...
01-D-12...
ADR
Legend:
To plan
To dispatch
Planned
In transit
At stop
Completed
Warning
Any stop
Date range
Mo 25/11 - Sa 30/11
Type to filter
All resources
Resources
Revenue & Extras
Current Activity
Mo 25/11
00:00
02:00
04:00
06:00
08:00
10:00
12:00
14:00
16:00
Dummy Resources

Pre-planning Views.

The planning board has the option for both a Pre-planning and a Planning panel The Pre-planning is only available if the main planning view is ***timeline/block/table***.

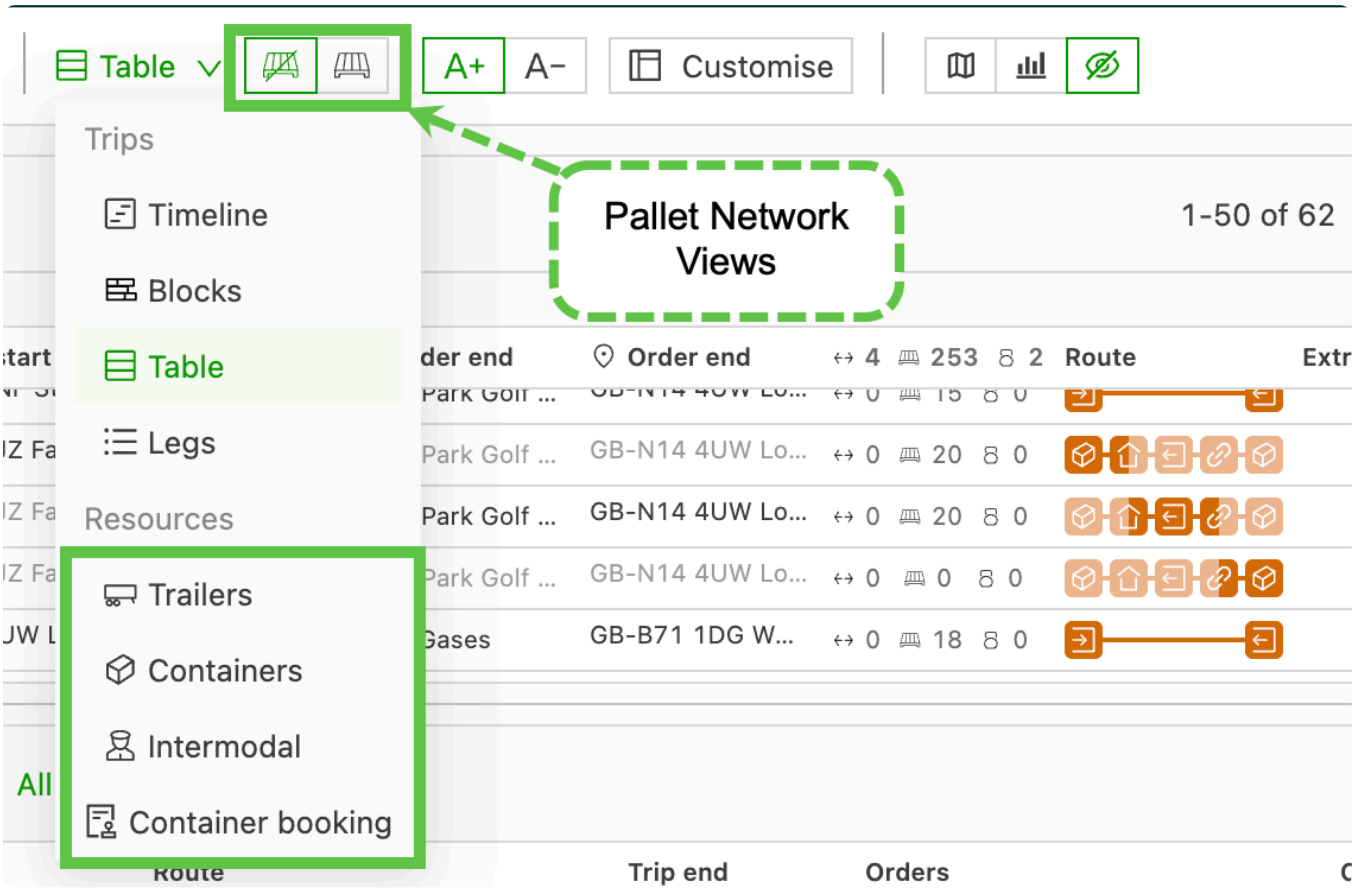


In these cases, you can choose between the follow views for Pre-planning:

- The same view as the planning board view. For instance, if the planning view is Blocks, then you can also choose Blocks for the pre-planning, if Timeline, the pre-planning view is also Timeline, etc.
- Table View. This is available for all the Planning options, excluding Legs (list (this is always available)
- Hide pre-planning

There is the option to Hide or Show Pre-Planning, as either the Table or Block view.
This option is ONLY available when using the Timeline, Blocks or Table Views. Preplanning views are not available if the main view selected is the List View.

Other available views are listed in below sections:



- **Trailer view:** See more info on: 🚚"Trailer planning(click)
- **Container view** : See more info on : 🚛 Container planning(click)
- **Intermodal view**: See more info on: 🌐"Intermodal planning(click)

- **Palletline/pallet network view**

Sharing views with other users

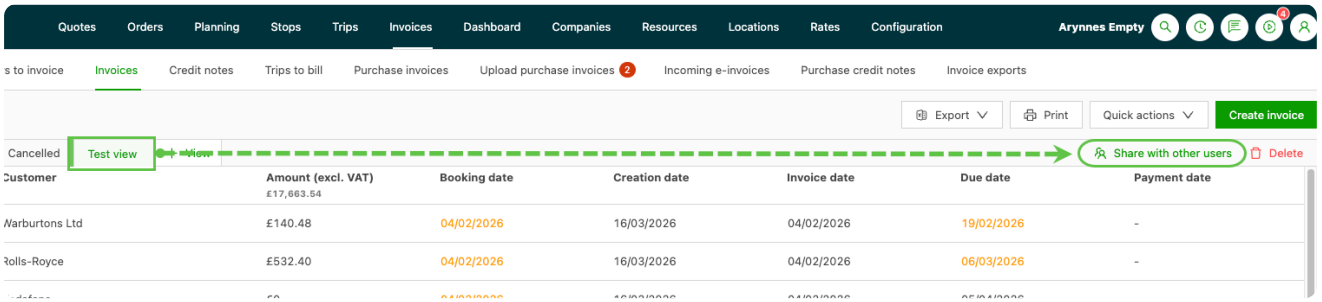
Shared views are configurations that all users of a team or organisation can access. These views allow consistent data presentation and standard workflows. However, since they are shared, updates to these views will have an impact on all users. Only Super Admins can create, edit, and save changes to shared views. Even if a user originally created a shared view, they cannot save changes to it unless they have Super Admin permissions.

> 🧰 Only **super admin users** can share (or manage) shared/custom saved list views. Regular users can still create ***personal*** views, but they cannot share them workspace-wide.

Custom views can be shared with other users. When a view is shared, both the filter configuration and the column ordering and visibility settings are included. This makes it easy for teams to work from a consistent data layout without each user needing to configure their own filters.

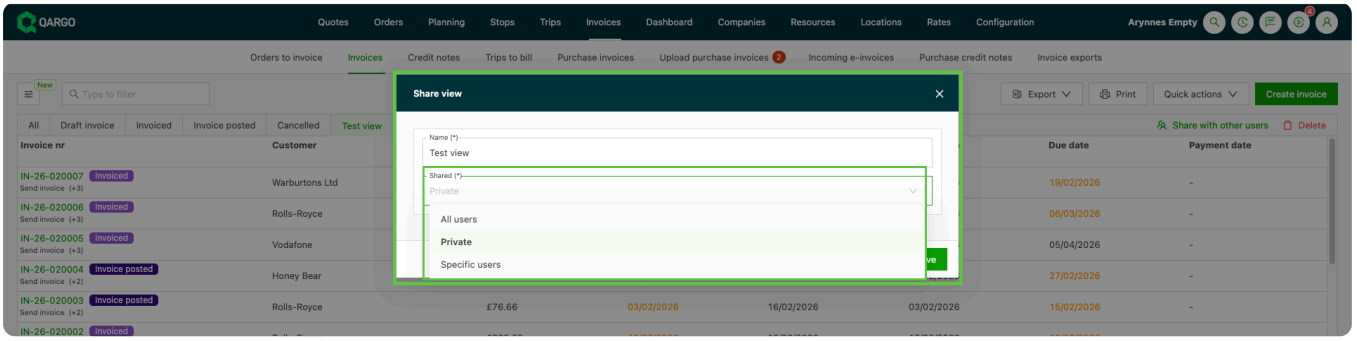
To **share** a custom view, options include sharing to ***ALL users or to selected users***

- From the custom view, click the ***'Share with other users'*** link

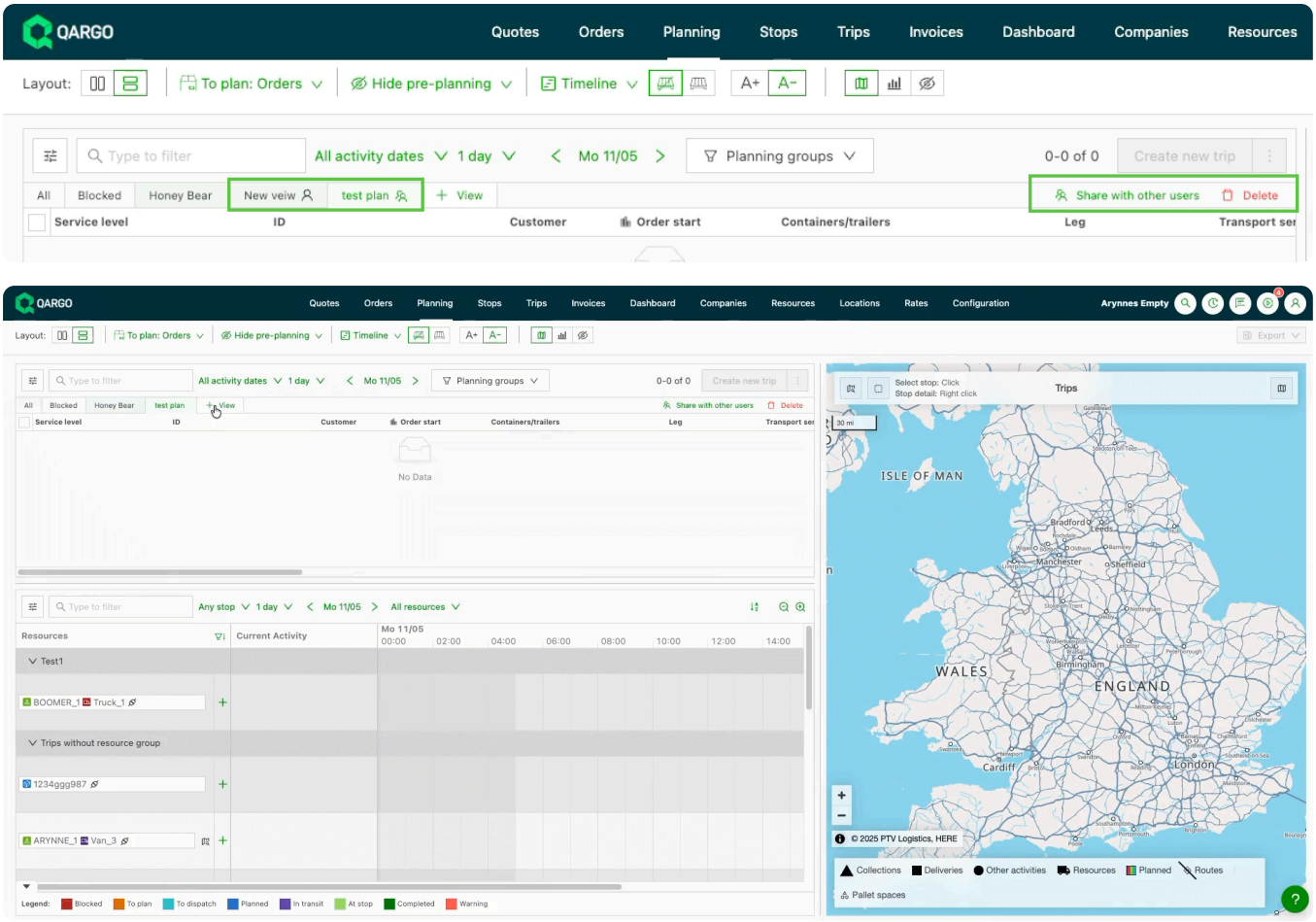


A popup screen will open allowing the user to select the sharing option:

- All users: Shares the view with all users that have access to the page / view
- Private: This keeps the view private to the user that created the view
- Specific users: Select users from the dropdown to share the view with (marked with ✅)
    - Multiple users can be selected, but must already exist in the platform



- This view will be shared with users within the organisation; an icon will be added indicating this is a shared view.



📚 The same modal is also used to update an existing view. The state can be switched at any time, users can be added or removed, or the view can be reverted to *Private*.