PLANNING - Board Filter options

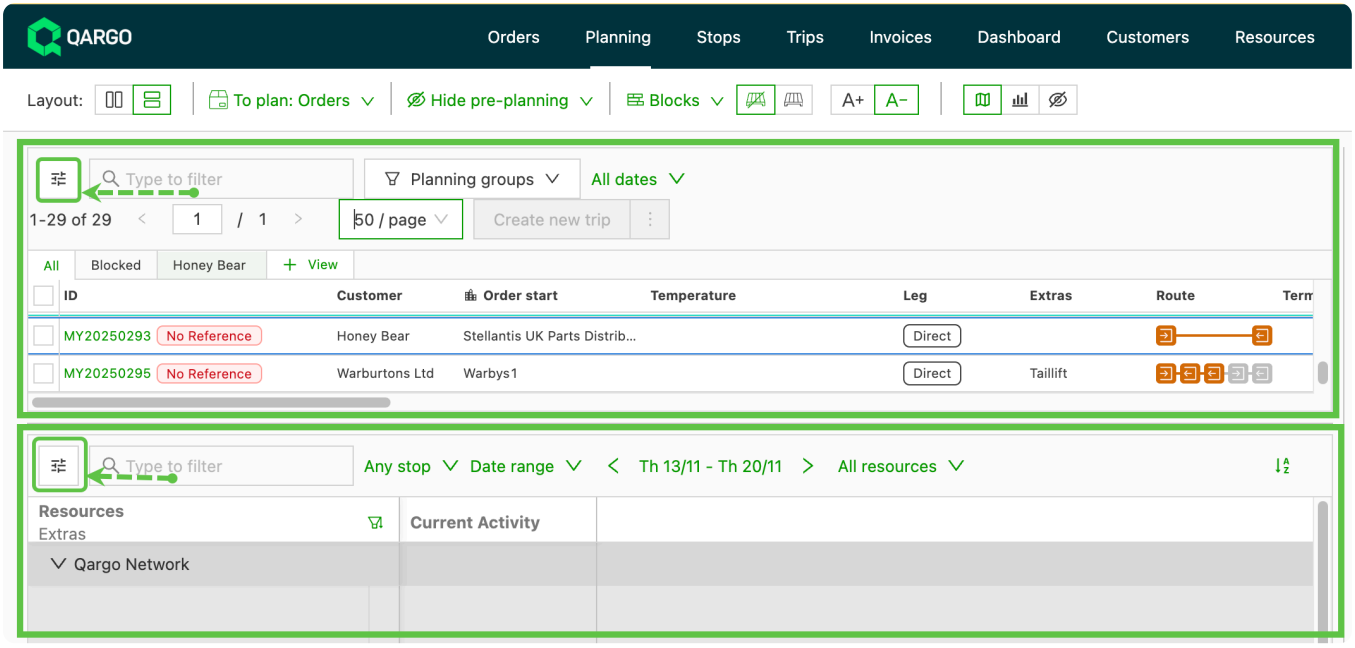
Plan faster with planning board filters: date range, resource availability (trips and current time included), custom fields, column headers, location and customisable Timeline and Blocks views.

Updated 23 October 2026

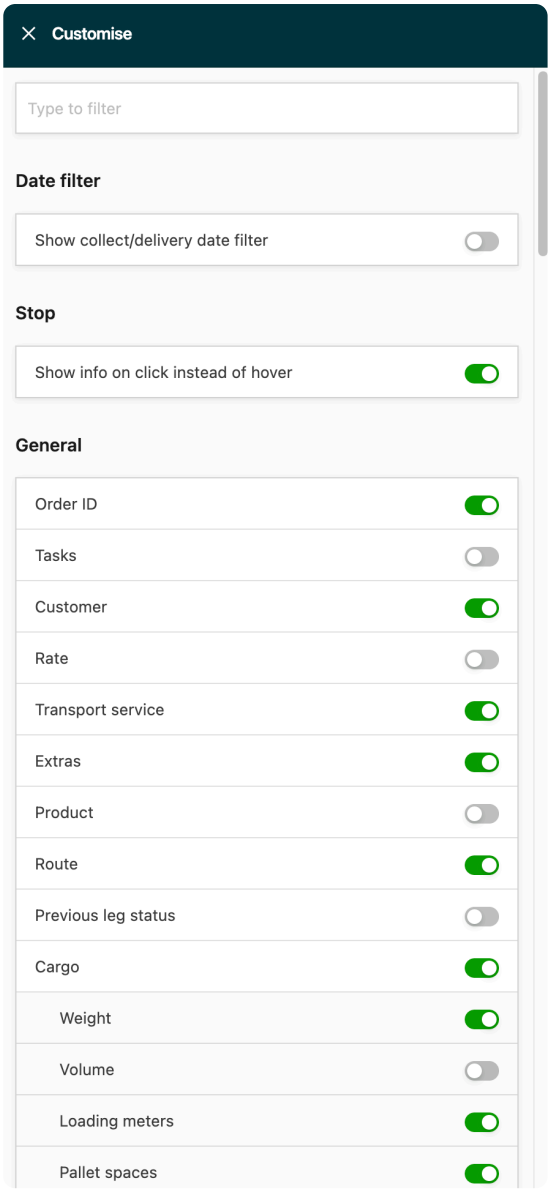
Filter data using *'Customise'* view option



Use the ***customise*** button in the To Plan or Plan board panels

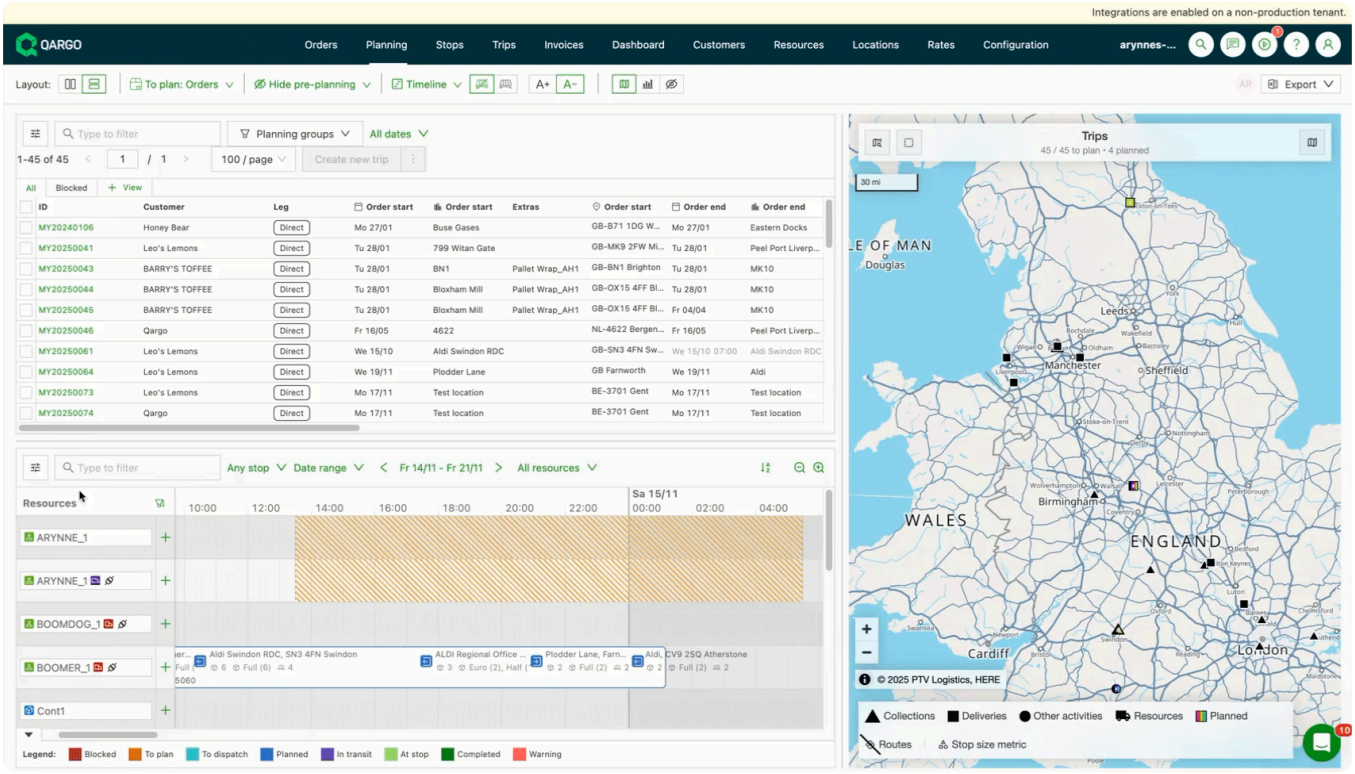


- Each option opens the customise panel where users can toggle on/off the specific data sets they want to include or exclude in the view

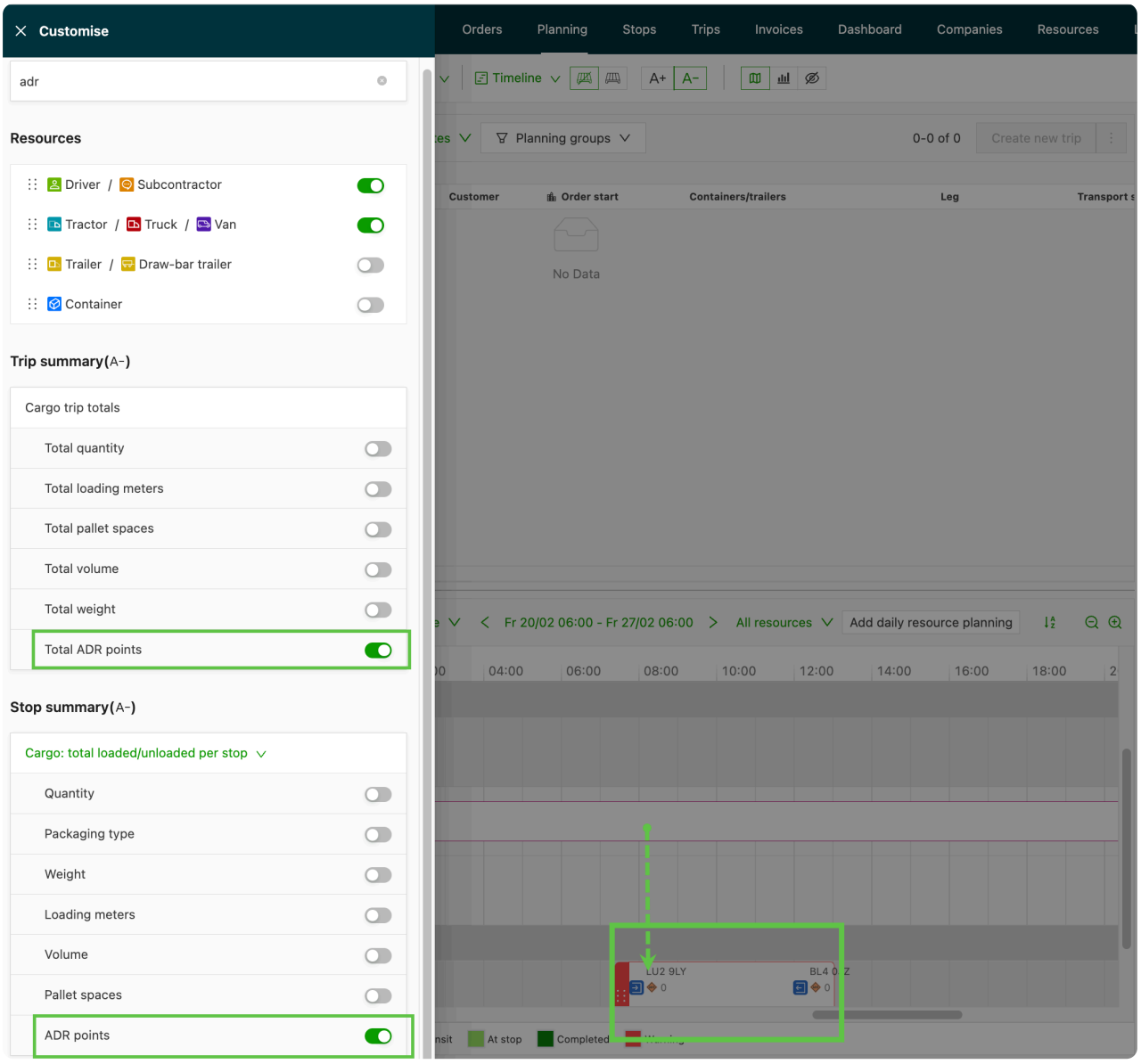


- To maximise screen view on the plan board use the option to ***Customise*** on the A+/A- views and toggle off any data that isn't required.
- Reducing visibility in this way will reduce each trip to a much smaller line in the board.

📚 If the Route option is toggled off, the stop activity icons will still show in the trip row on the plan board. This allows users to keep visual on the trip progress.

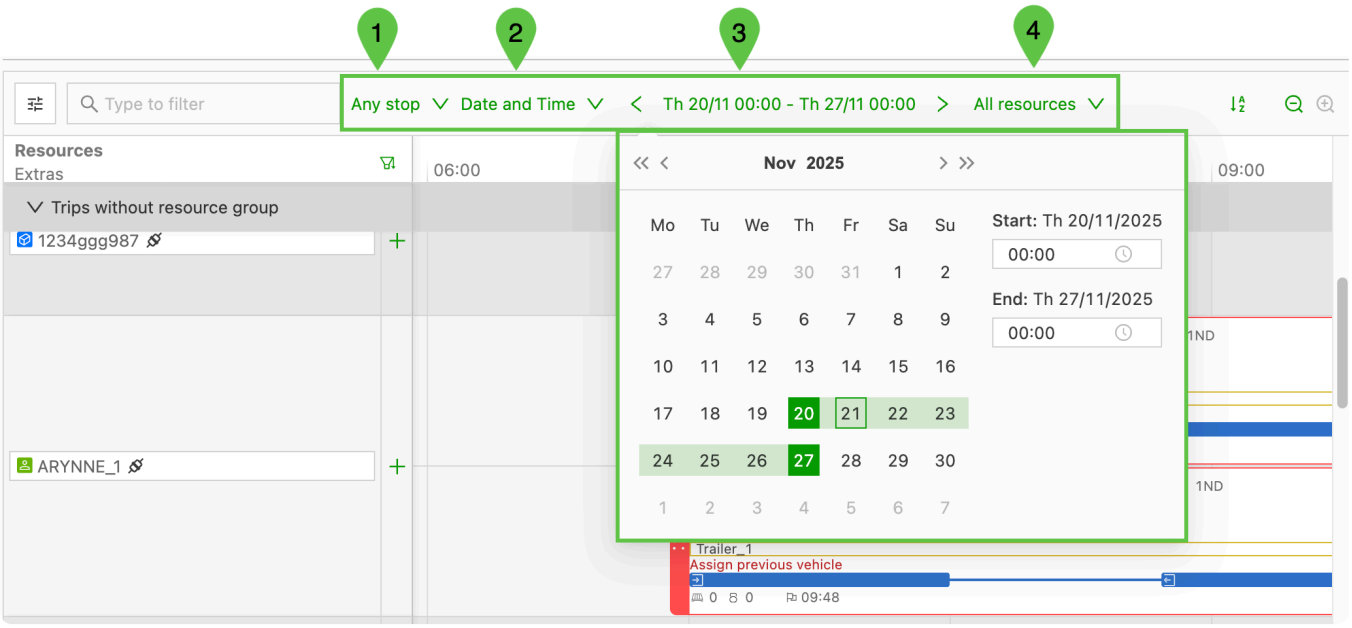


- Include **ADR point visibility** in trip details will show the ADR icon making it easy for planner to identify loads



Filter by Date / Time

Users have the additional options to select for a specific number of days and **DATE** and **TIME RANGE**.



1. Any stop or Start trip: Default is 'Any Stop'. Manually update to 'Start trip' to only see trips ***starting*** (with the first stop activity) within the selected dates
2. Date options including:
    1. 1 day
    2. Date Range
    3. Date and Time
3. Date or range selected. Use the Arrows to move forward / backward in time
4. Resources: Show all resource / Only dummy resources / Hide dummy resources

📚 The standard **Date Range** filter returns orders where a to-plan stop date falls exactly within the selected range.

Any date between collect & delivery

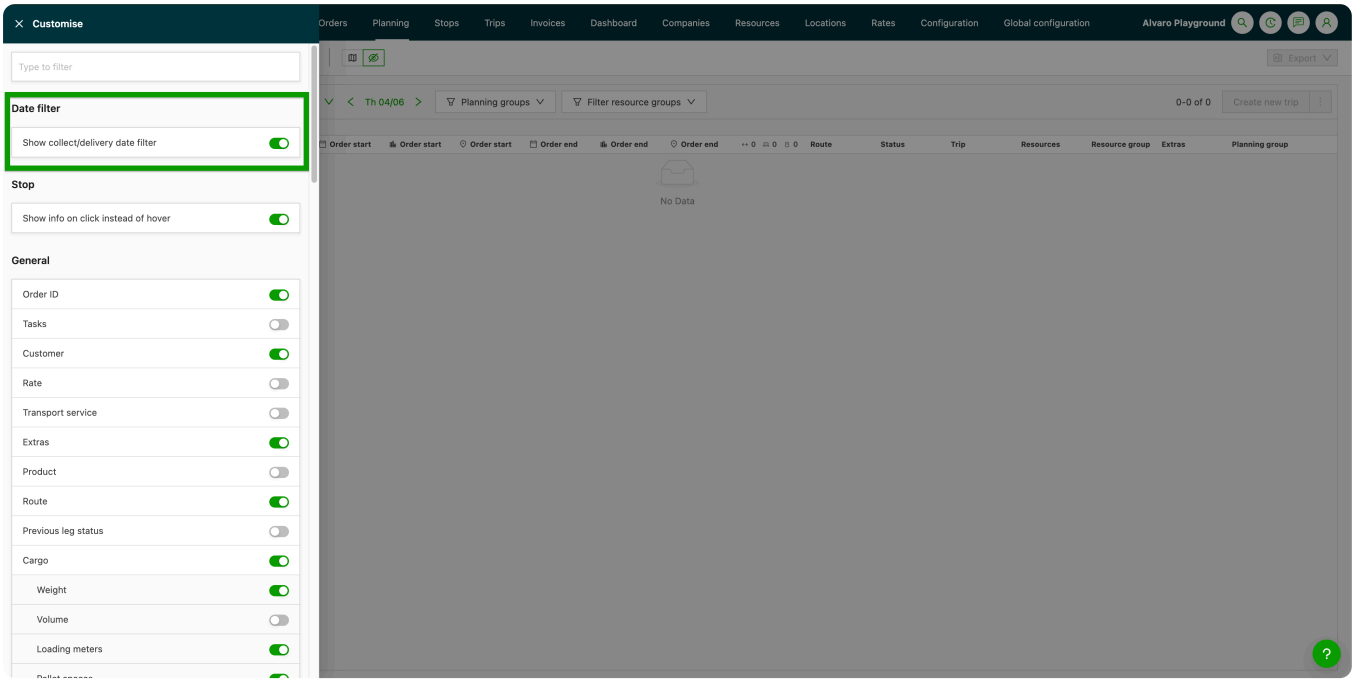
The **Any date between collect & delivery** option applies a broader check: an order appears in the ***To Plan queue*** if any date in the selected range overlaps with the full collect-to-delivery window, inclusive of both the collection and delivery dates.

Use cases:

- Orders with multi-day collection and delivery windows imported via EDI or API (e.g. collect Mon-Wed, deliver Thu-Fri) appear in the To Plan queue across all days within those windows, giving dispatchers full visibility without switching the date filter for each day.
- Groupage and LTL operations where collection windows span multiple days can surface all available-to-plan orders in a single view.

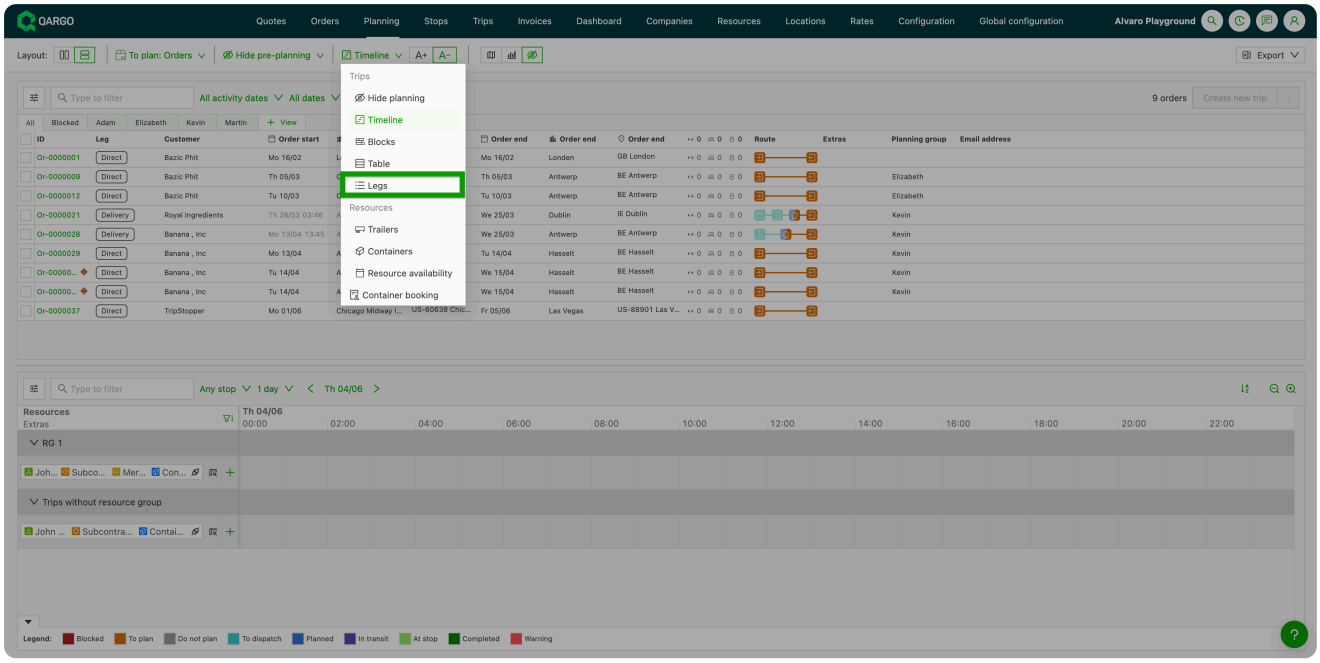
Prerequisite:

- Make sure to toggle on "Show collect/delivery date filter" in the customise section.

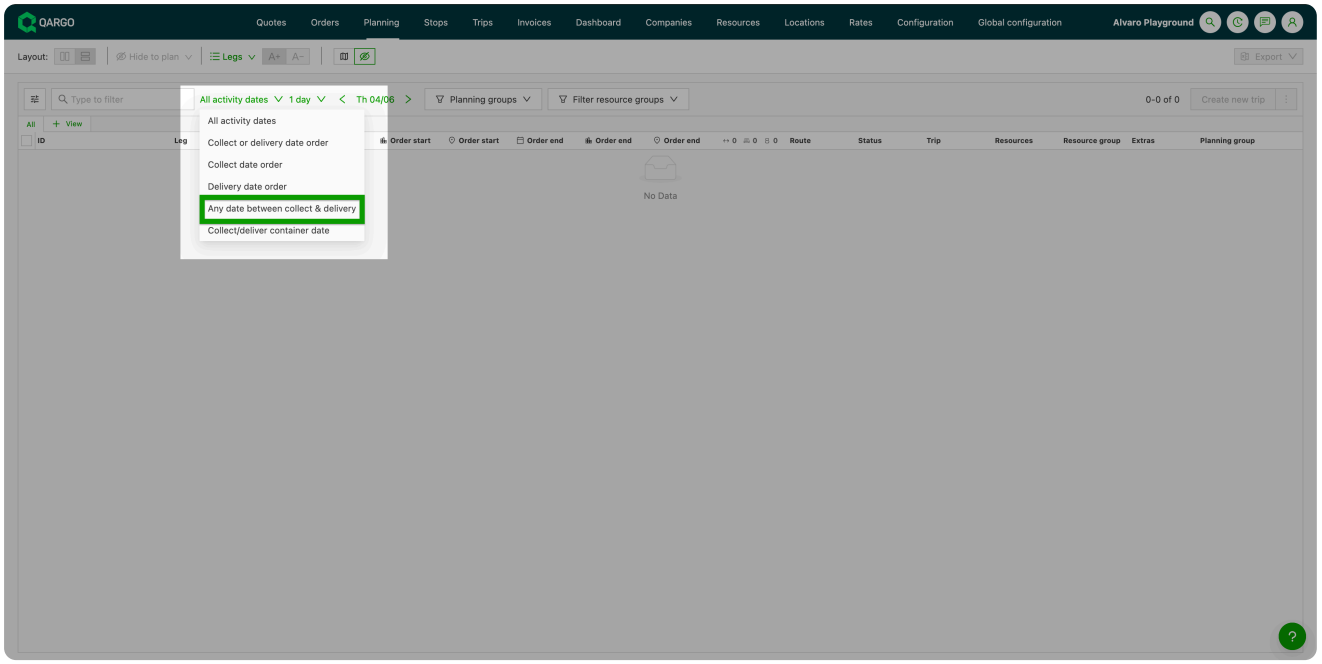


Steps:

1. **NAVIGATE** to the **Planning** board.
2. **OPEN** the **Legs ▾** dropdown in the toolbar and **SELECT Legs**.



3. **LOCATE** the date filter in the To Plan filter bar (defaults to **Any stop**).
4. **OPEN** the filter dropdown and **SELECT Any date between collect & delivery**.



All orders with a to-plan stop dated anywhere within the selected range will appear in the queue.

> 📚 This filter applies to the **To Plan** section only and does not extend to the Plan board or other views. Orders without stop-level dates set may not appear as expected.

Filter by column headers

- Hover over the column header and a 'funnel' icon is displayed, click this to show the filter options available.
- Filter options vary depending on the specific column availability, but can include:
  - Customer
  - Leg
  - Date and time options

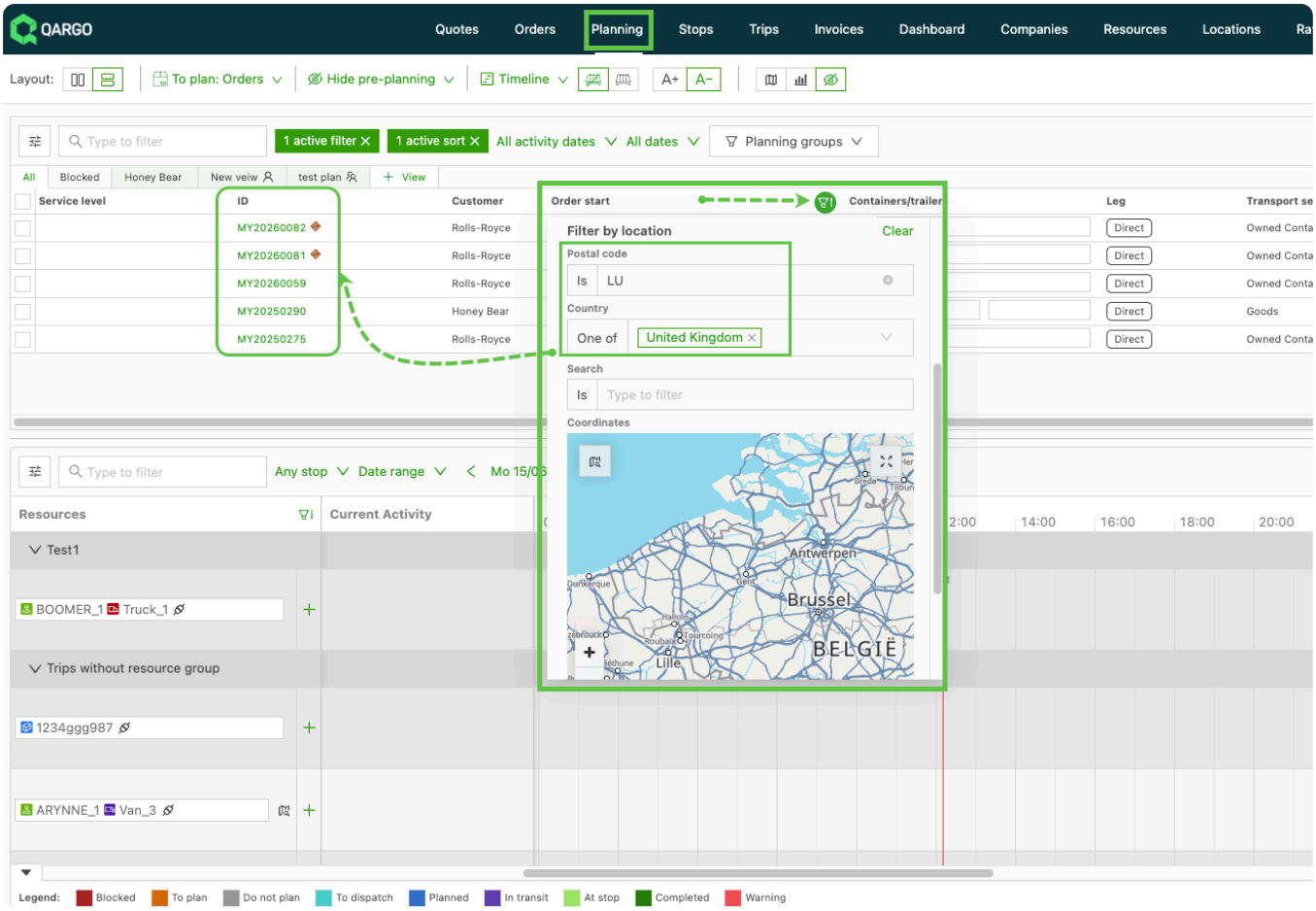
Filter by location

The location column filter sub-fields, (Search, Location, Postal code, Country, and Coordinates) simultaneously. This enables complex, multi-field searches with **"AND"** logic across all application screens, eliminating the need to toggle between options. The enhanced functionality streamlines workflows and enables specific queries, such as filtering for both countries and postal codes at once.

> 📚 Location filtering is also available in Orders and Trips List views.

Using the Combined Filter

1. **OPEN** the filter on any location column.
2. **VIEW** all sections at once
3. **COMBINE** sections as needed, for example *Country* = FR together with *Postal code* starts with 25, to return only rows matching all conditions.
4. **APPLY** the filter; it also combines with filters set on other columns.



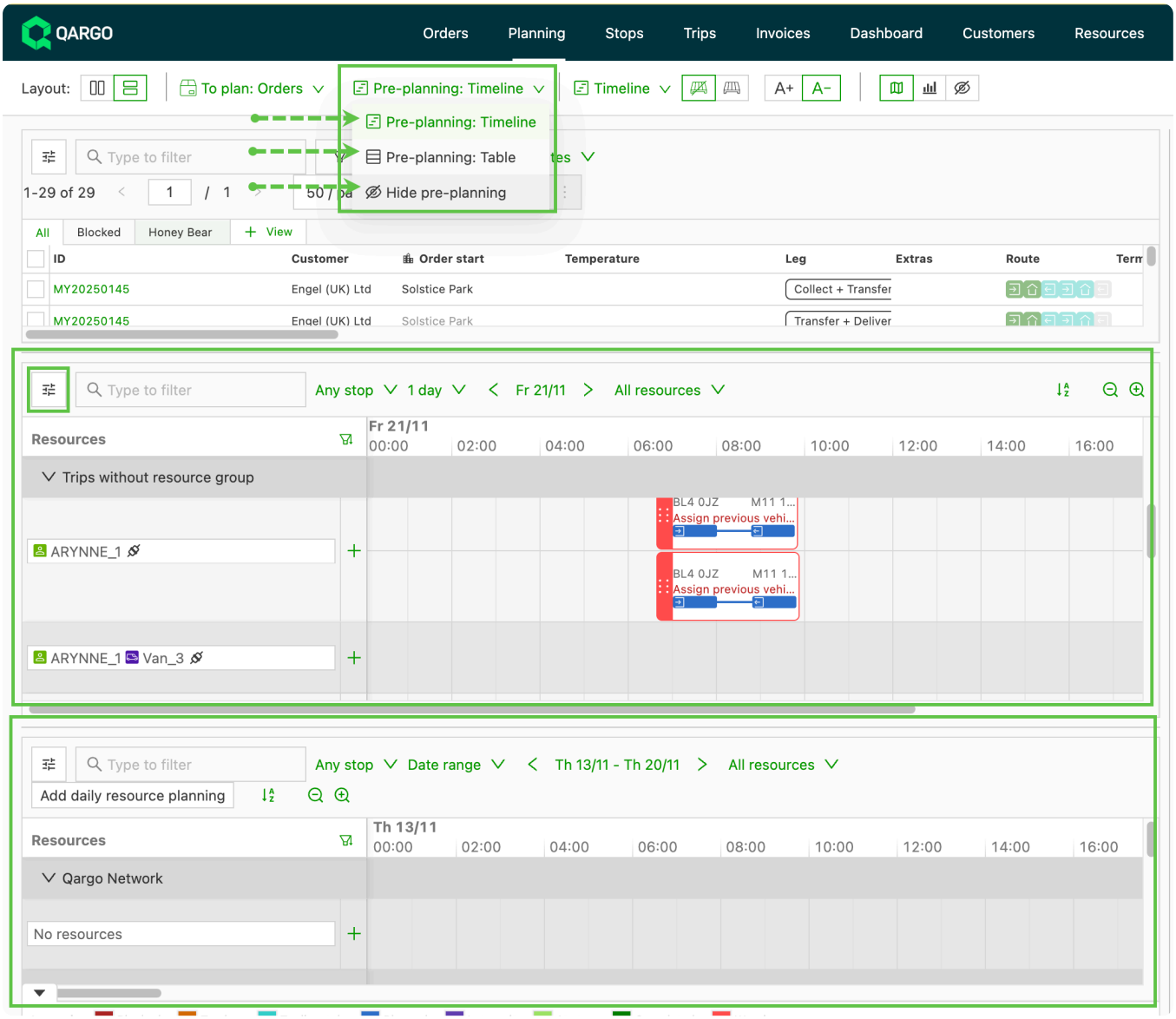
Saved Views

- Existing saved views migrate automatically. A view that filtered on, for example, *Postal code* keeps working and shows that value in its own section.
- No clean-up is required after migration.

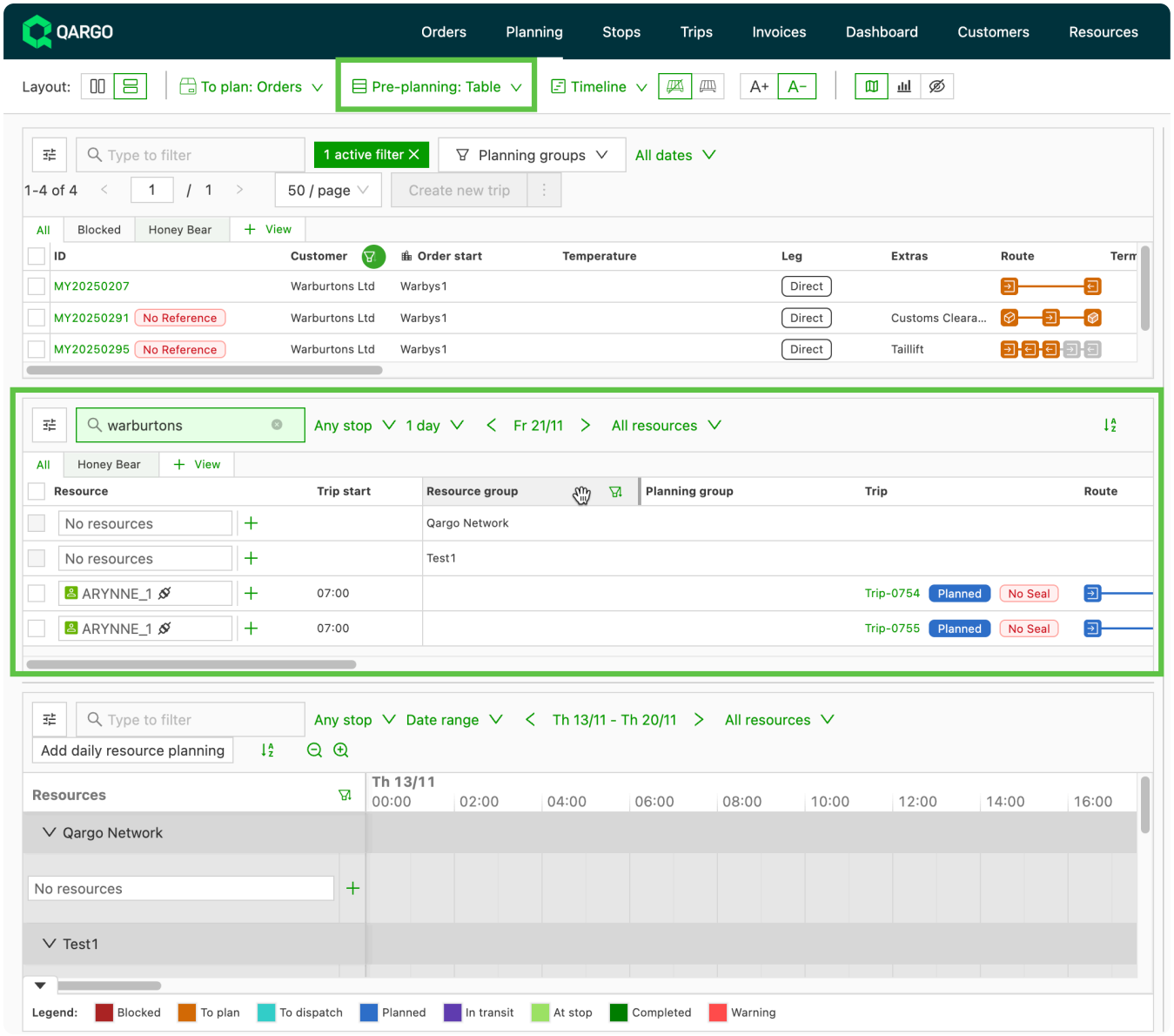
> ‼️ Sections always combine with **AND**; there is no AND/OR choice.
> The *Search* and *Coordinates* filters keep their current behaviour; only their position changes as they move out of the dropdown.

Planning & Pre-planning Views

- Separate views for the planning and pre-planning tables available.
    - Pre-planning is matched to the plan board, ie: if Timeline is selected, this will be shown as default.
    - Manually update to use the Table for a simply row view



- Use the ***'+View' tab*** to create a specific view in the To Plan (orders only)
  - Column headers can be filtered to create the subset of data to display in the custom view.
  - Use search filter to look for specific customer to plan



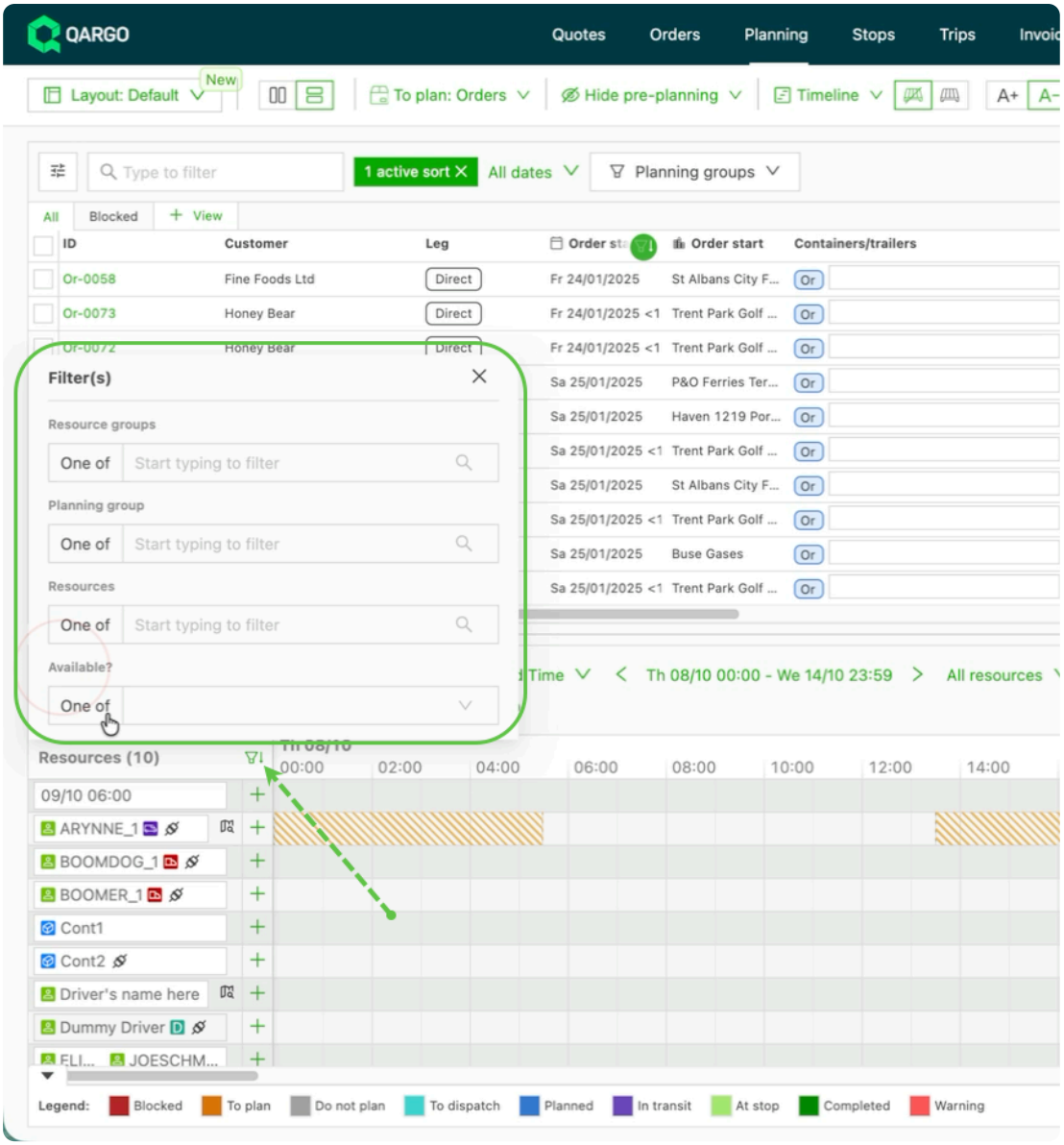
Filter by Resource Availability

The *Available?* filter shows which resources or resource combinations can still take work in the selected date range. It looks at ***logged unavailabilities and planned trips***, and it ***only counts the time from now onwards***.
A truck that is fully planned for the rest of the day no longer shows as available.
The filter is in the resource filter menu on these views:

- *Trips: Timeline* (planning board)
- *Trips: Blocks* (planning board)
- *To plan: Resources - Timeline*
- *Pre-planning*

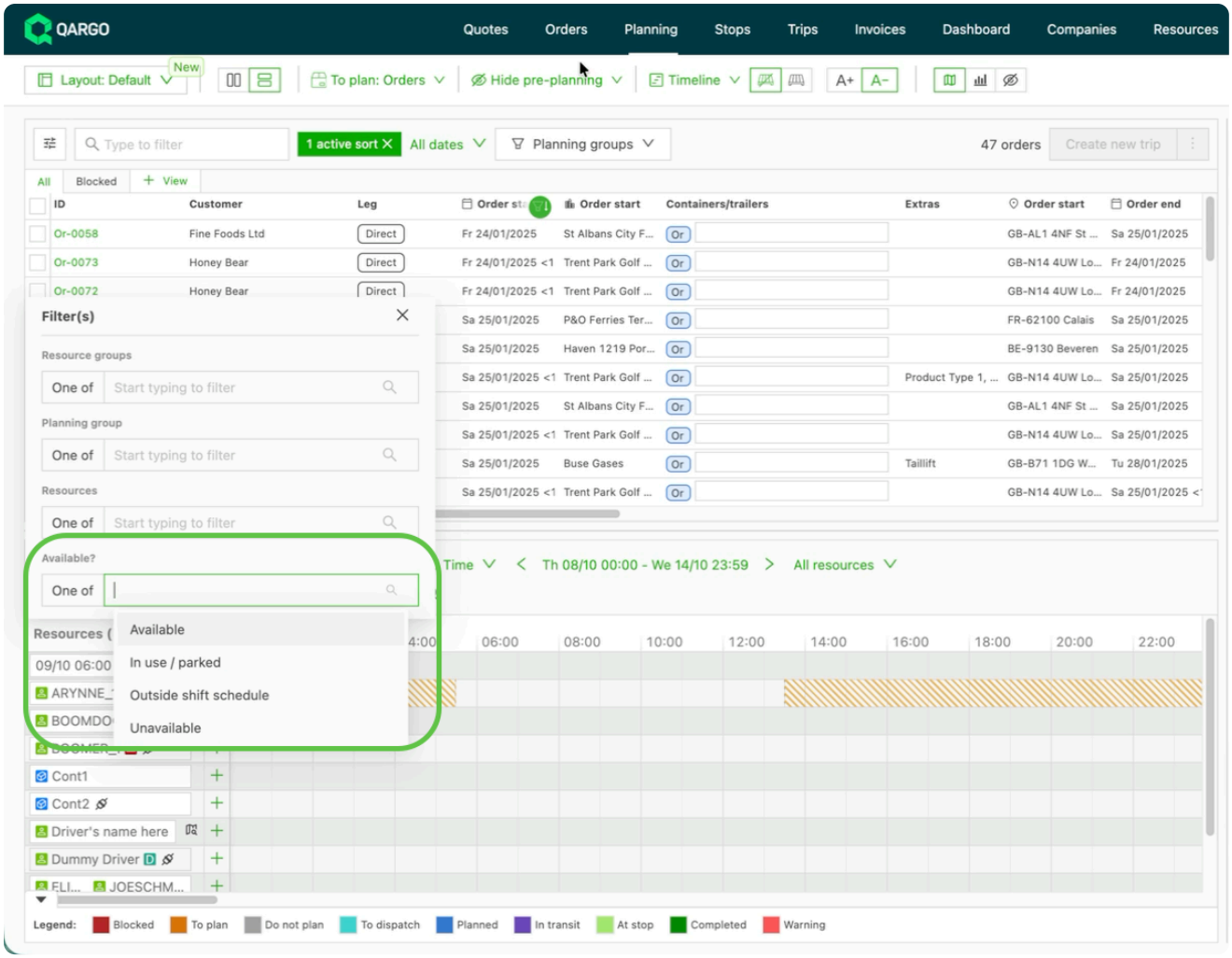
APPLY the Available? filter

1. **OPEN** the planning board and **SET** the date range with the date selector.
2. **CLICK** *Filter(s)* in the *Resources* column header.



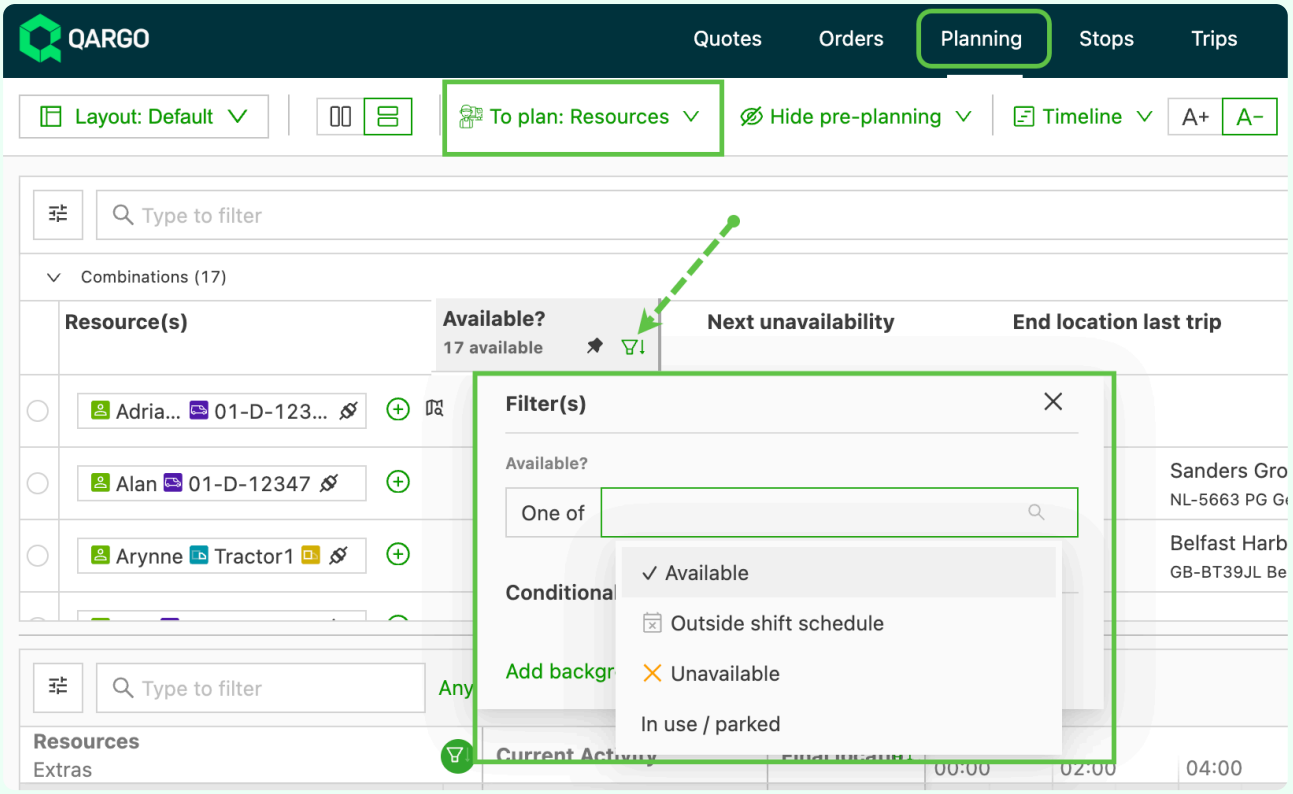
3. **SELECT** *Available?* and choose an operator: *Is*, *Is not*, *One of* or *Not one of*.

4. **SELECT** one or more options:



- *Available* - the resource has some free time left in the range
- *Outside shift schedule* - every day in the range is a rest day in the resource's shift schedule
- *Unavailable* - the remaining range is fully covered, and at least one logged unavailability is part of it
- *In use / parked* - the remaining range is fully covered by planned trips only, or the resource is parked

📚 These are the same four statuses as the availability filter in *To plan: Resources*, so the filters always agree.



🧰 The filter is applied per board panel. Changing it on *Trips: Timeline* does not change the *To plan* or *Pre-planning* panel, and the other way round.

How availability is calculated

- **Only time after the red line counts.** The red line on the board is the current time. When the date range includes today, anything before the red line is ignored. Earlier days in the range are ignored too.
- **Any free time counts.** A resource stays *Available* as long as any time between the red line and the end of the range is unplanned, even a short gap between two trips, on any day in the range.
- **Trips and unavailabilities that cross the red line still block.** A trip that started this morning and runs until 18:00 blocks the resource until 18:00.
- **Planned, in progress and completed trips block.**
- **Cancelled trips never block.**
- **Trailers are freed at their drop stop.** A trailer dropped mid-trip becomes available after that stop, while the truck stays blocked until its trip ends.
- **The filter updates every minute.** As the red line moves, a resource whose trip is about to start drops out of *Available* without refreshing the page.
- **A date range fully in the past returns no available resources.**

Saved views and older links

Saved views and shared links that used the previous *Available* Yes / No filter keep working and return the same resources:

Old filter	New filter
Available = Yes	*Available? One of Available, Outside shift schedule*
Available = No	*Available? One of Unavailable, In use / parked*

🧰 Changing the value or operator on a migrated filter saves the new version.

Limitation	Details
Reservations do not block	A reserved resource with no trips or unavailabilities still shows as *Available*.
Shift schedules never make a resource *Unavailable*	A resource whose shift schedule marks every day in the range as a rest day shows as *Outside shift schedule*, not *Available*.
Start trip date filter	With the Planning date filter set to *Start trip*, a trip that started before the selected range does not block the resource. The default *Any stop* setting is not affected.
Single row count	The header shows one total of resource rows, not a count per resource type. A resource listed in two planning groups counts twice.
Absence type not distinguished	All unavailability types (holiday, sickness, maintenance, etc.) are treated the same. Notes are not treated as unavailabilities.

Troubleshooting

Issue	Explanation / Resolution
A busy truck still shows as *Available*	Check for a gap between trips after the red line. Any free time, however short, keeps the resource *Available*. A reservation also does not block.
A truck with a cancelled trip shows as *Available*	Expected. Cancelled trips never block a resource.
Available? returns *Resources (0)*	Check the date range. A range fully in the past returns no available resources.
A resource is missing from *Available* but has no trips	Check its shift schedule. If every day in the range is a rest day, it shows under *Outside shift schedule*.
An old saved view shows different filter options	Expected. *Available* Yes / No was converted to *Available?* with the matching options and returns the same resources.

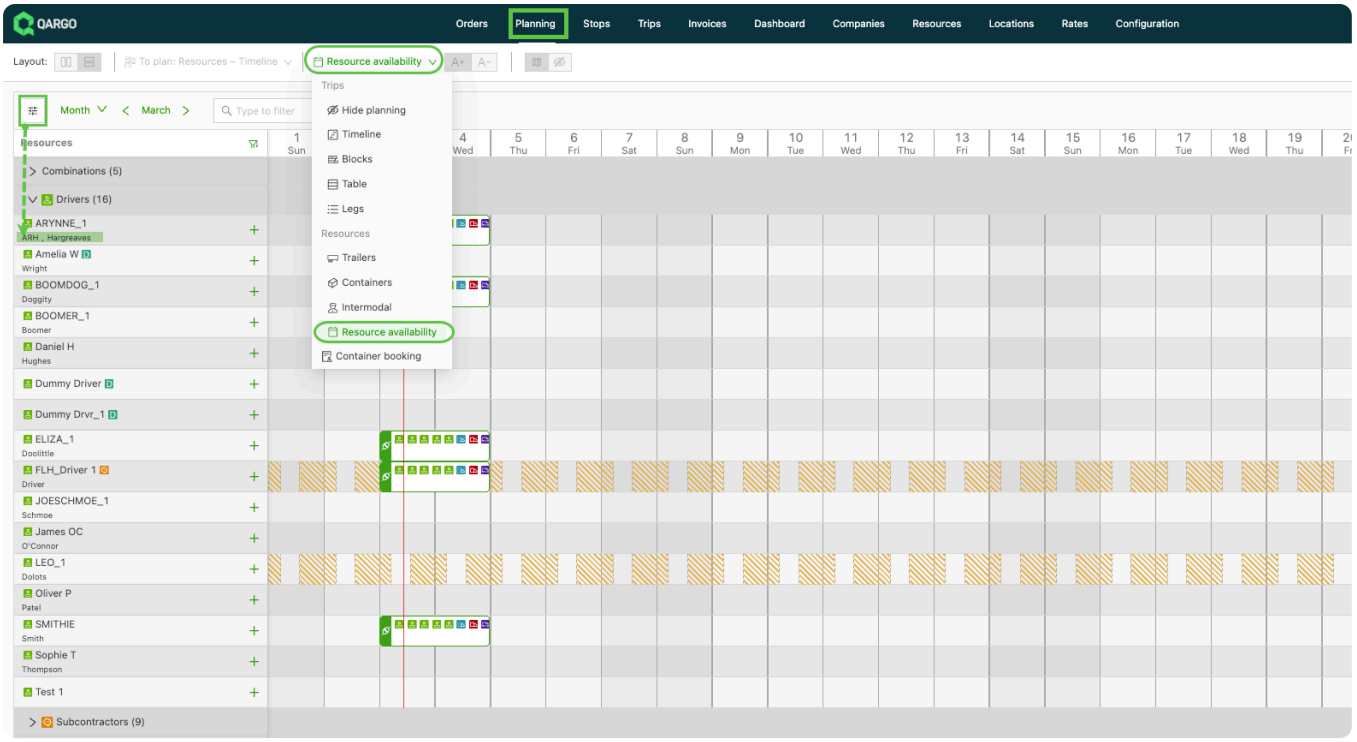
Filter by Custom Fields in To Plan Resources

For transport companies managing large fleets, it is now possible to bring custom resource fields directly into the ***To Plan Resources* panel** — and filter the resource list by those fields.

📚 Replaces the need to rely solely on resource groups when searching for the right driver, vehicle, or trailer.

Custom field columns and filtering are available in the following views:

- *To Plan Resources* table
- *Timeline view* (custom field values visible below resource name)
- *Resource Availability* view (custom field values visible below resource name)

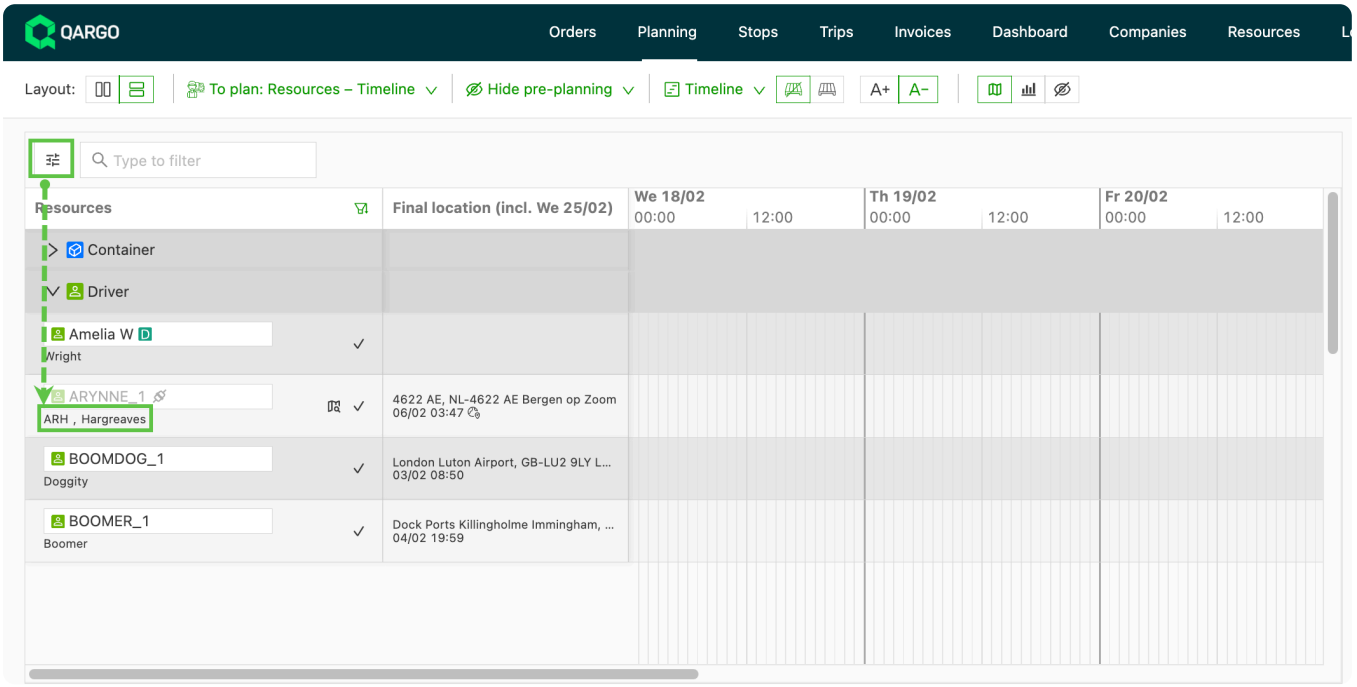


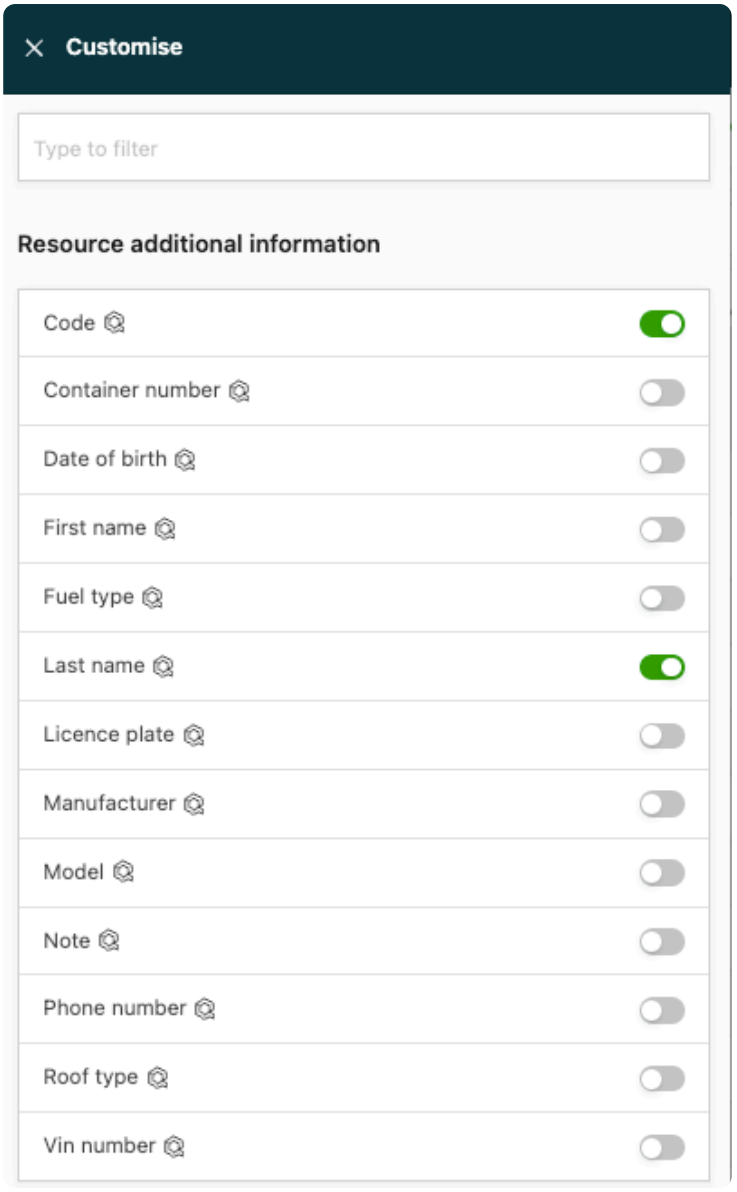
Show custom field columns in To Plan Resources

CONFIGURE custom field columns

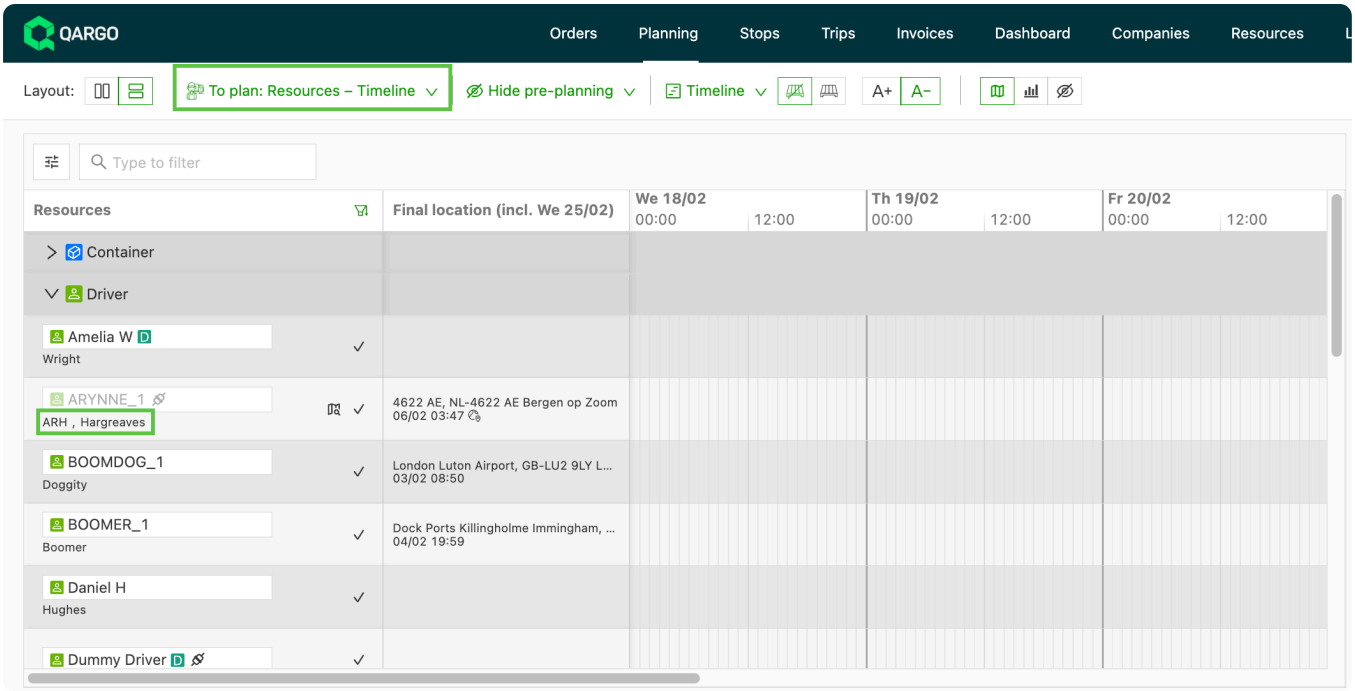
1. **NAVIGATE** to the planning board and open the *To Plan Resources* panel.
2. **CLICK** the *Customise* button within the To Plan Resources section.
3. **TOGGLE ON** the custom fields to display as columns. Only fields that have been configured on the resource type will appear here.
4. **CLOSE** the customise panel. The selected columns now appear in the resource table.

> 📚 This *Customise* button is specific to the To Plan Resources panel and controls which columns appear in the resource table. It is separate from the *Customise* button used to control trip data visibility in the board view.

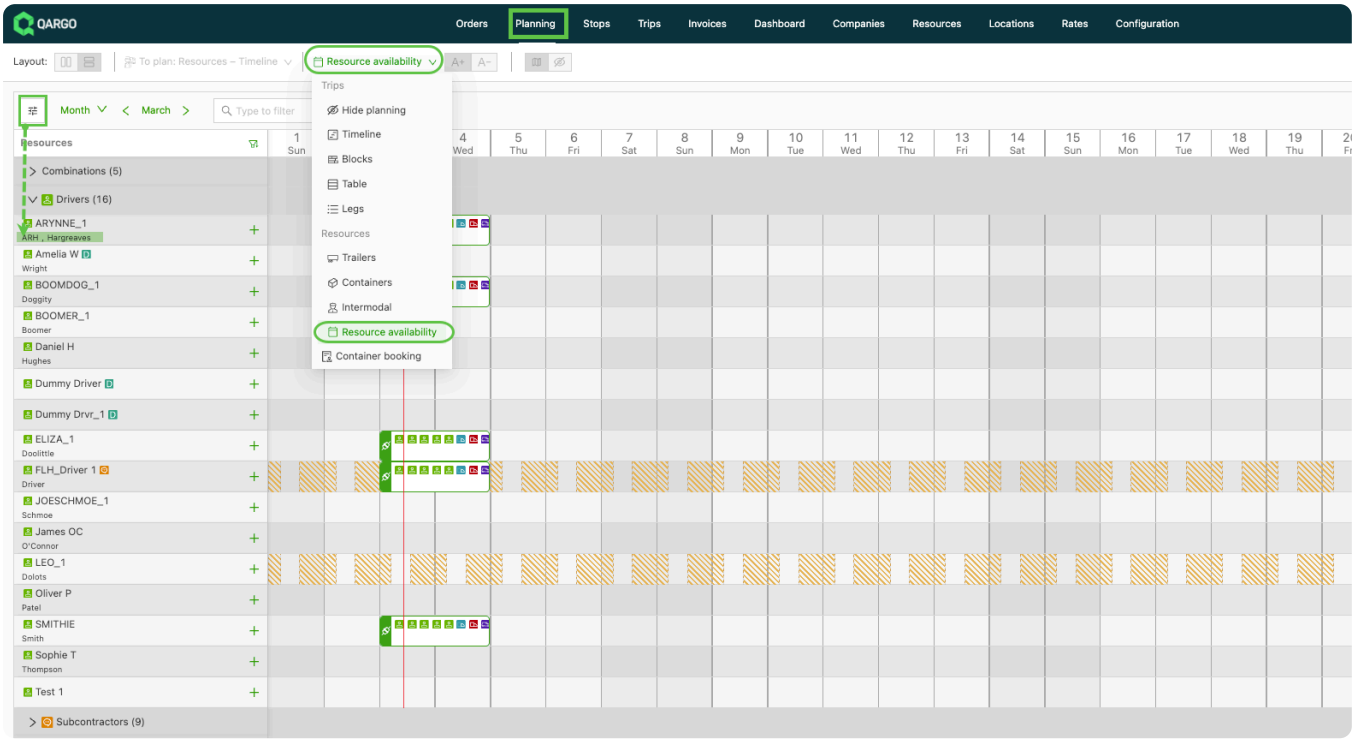




- Custom field values are also displayed below the resource name in:
  - *Timeline* view



- *Resource Availability* views, providing at-a-glance context without opening the resource record.

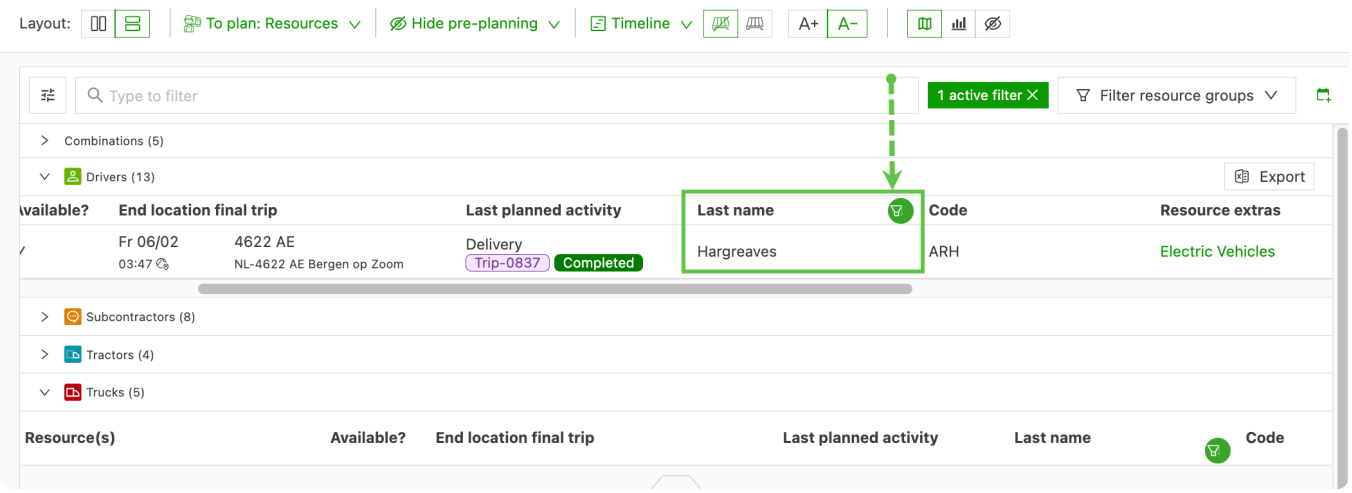


Filter by custom field values

Once one or more custom field columns are visible, those columns can be used to filter the resource list.

FILTER resources by a custom field

1. **HOVER** over the custom field column header in the To Plan Resources table. A filter icon appears.
2. **CLICK** the filter icon to open the filter options for that column.
3. **SELECT** the value(s) to filter by. The resource list updates immediately to show only matching resources.
4. **REPEAT** for additional columns to apply multiple filters simultaneously.



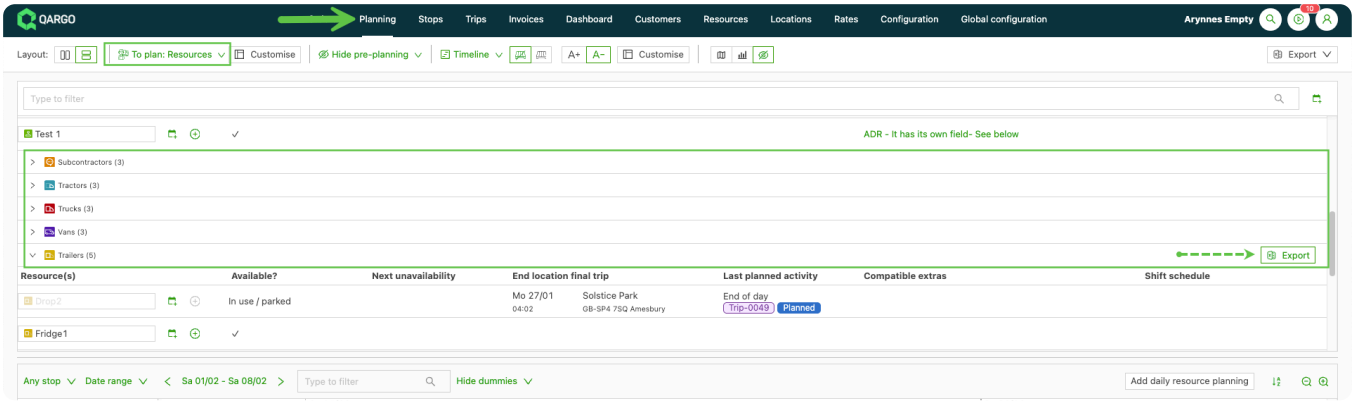
When one or more column filters are active, a ***Clear all filters*** button appears in the panel header. **CLICK** *Clear all filters* to remove all active column filters at once.

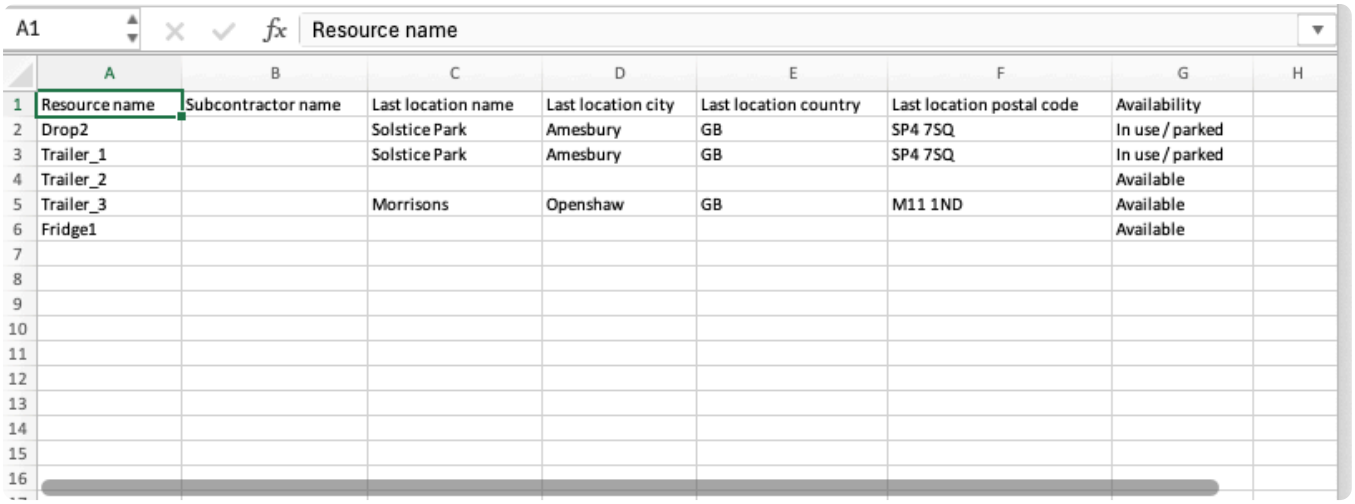
Limitations

Limitation	Details
Sorting not yet supported	Resources cannot be sorted by custom field column values. Default sort order applies.
Custom fields must be configured on the resource	Only fields that have already been added to the resource type appear in the Customise panel. Fields are configured in *Settings > Resources*.

Planning: Resource Availability report.

Under planning, it is now possible to export an overview of resource availability, based on the resource type. Under TO PLAN, select Resources. As you hover each line, the option to Export should show on the right side. The export will show the resource availability, including last location details.





A1 | Resource name

	A	B	C	D	E	F	G	H
1	Resource name	Subcontractor name	Last location name	Last location city	Last location country	Last location postal code	Availability	
2	Drop2		Solstice Park	Amesbury	GB	SP4 7SQ	In use / parked	
3	Trailer_1		Solstice Park	Amesbury	GB	SP4 7SQ	In use / parked	
4	Trailer_2						Available	
5	Trailer_3		Morrisons	Openshaw	GB	M11 1ND	Available	
6	Fridge1						Available	
7								
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