PLANNING - Customisation Toggle Options

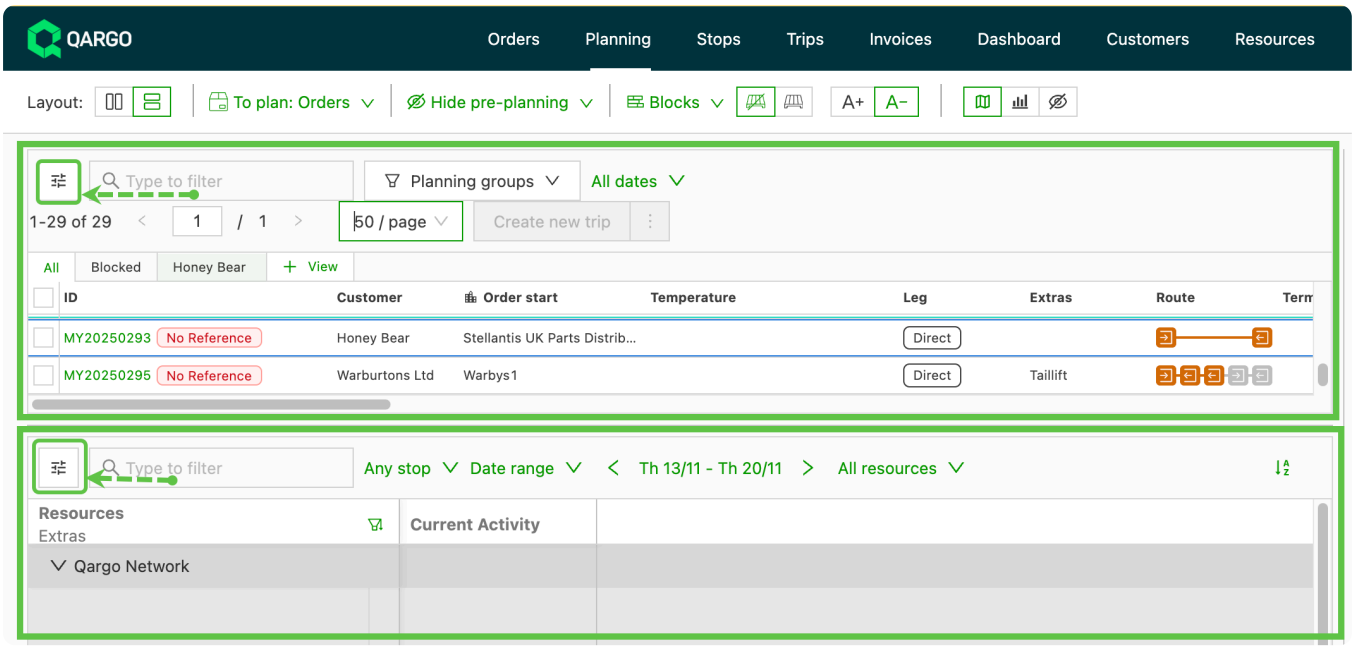
This article gives an overview of the new customisation options available to users, to give higher levels of visibility when planning.

Updated 14 October 2026

INTRODUCTION

Customisation toggles are available in the Planning board that will allow more selectivity for what is displayed in the planning board. This helps improve overall granularity of what is possible to display.

- **Access customisation** on either the 'To Plan' (orders / resources) or for the Plan Board.



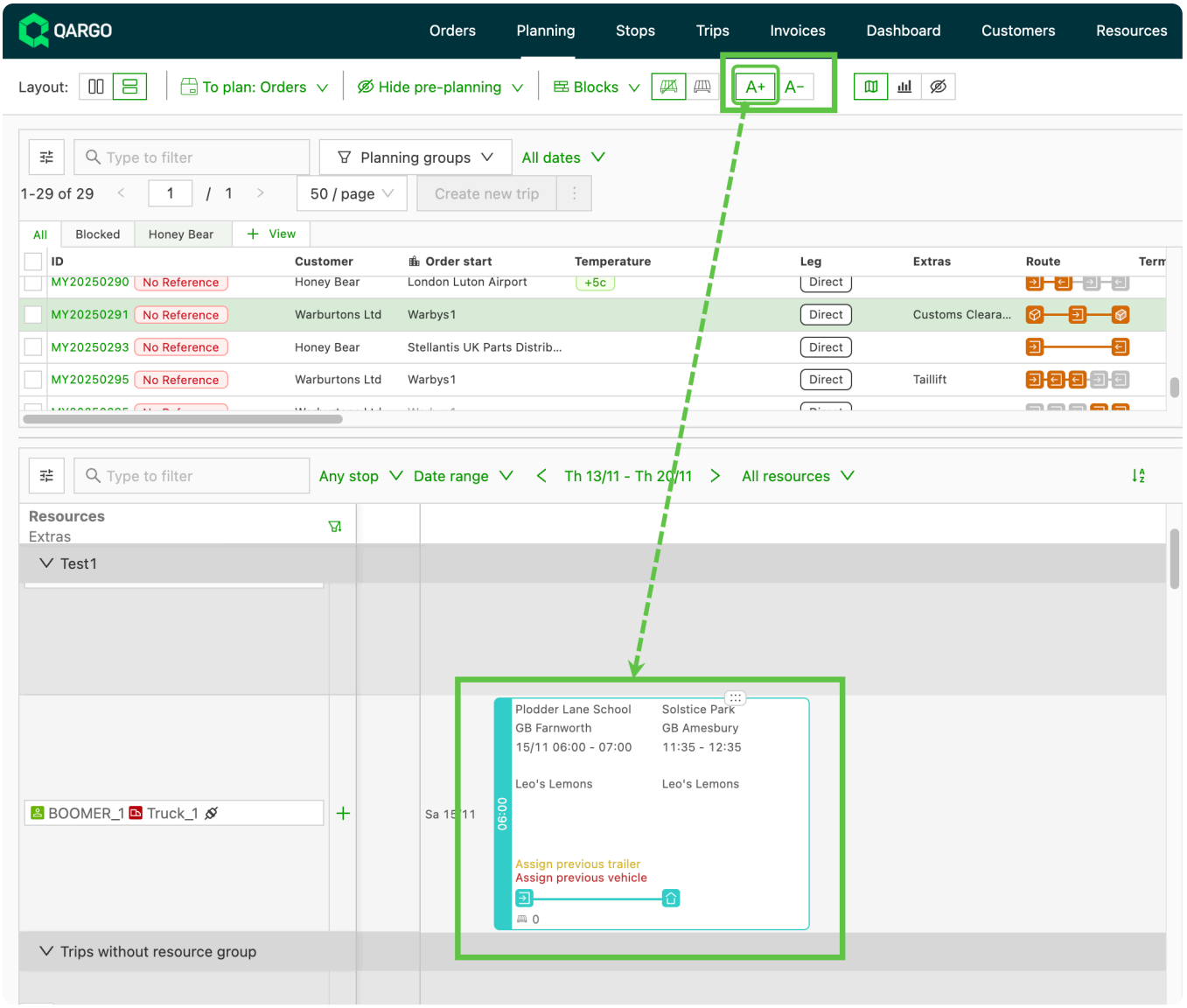
Key features include:

- 3 Customised View options (A+/A-, Orders & Trips)
- Improved visualisation consistency for all information
- Additional fields for trips and stops

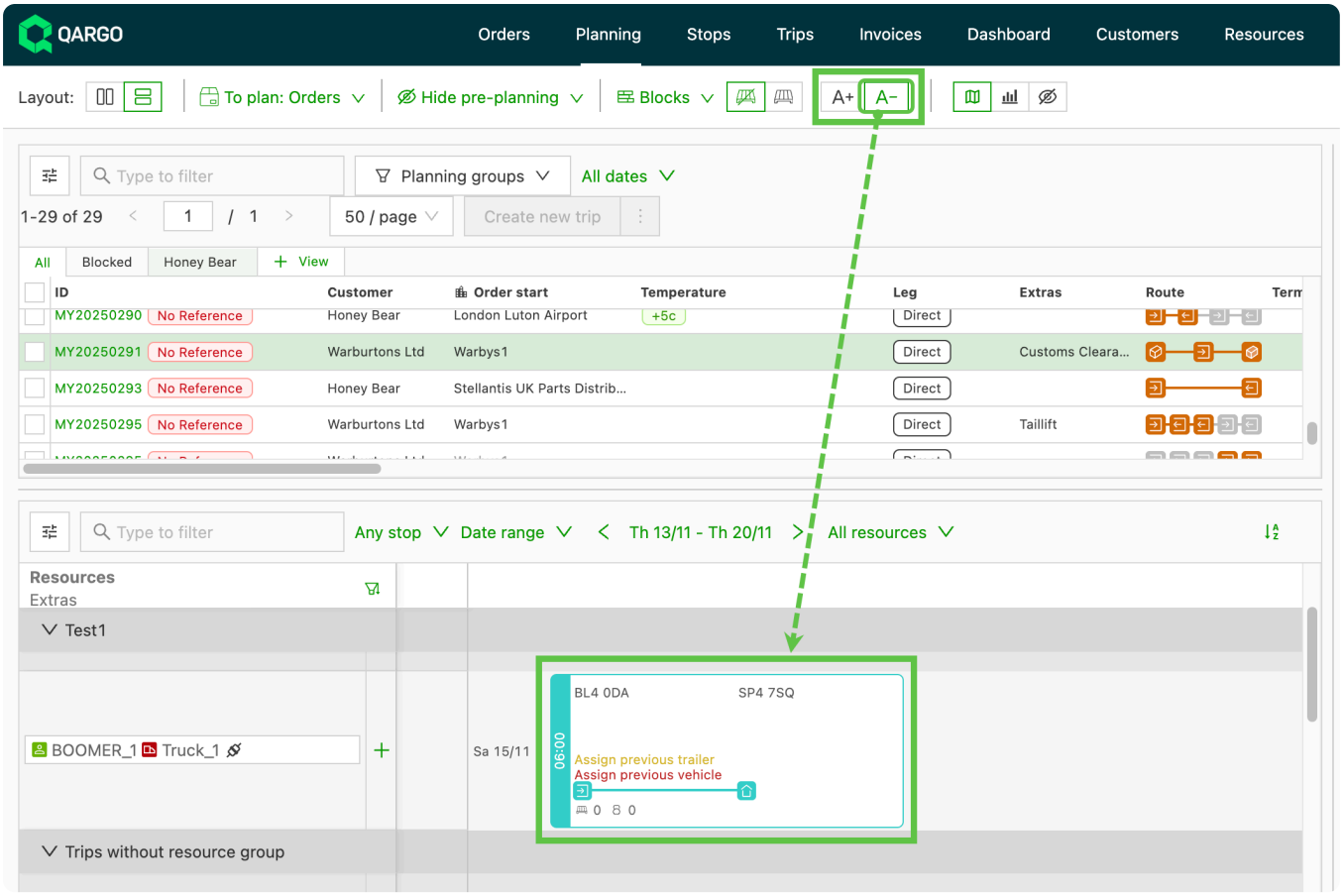
SUMMARY OF VIEWS

3 customisable views available.

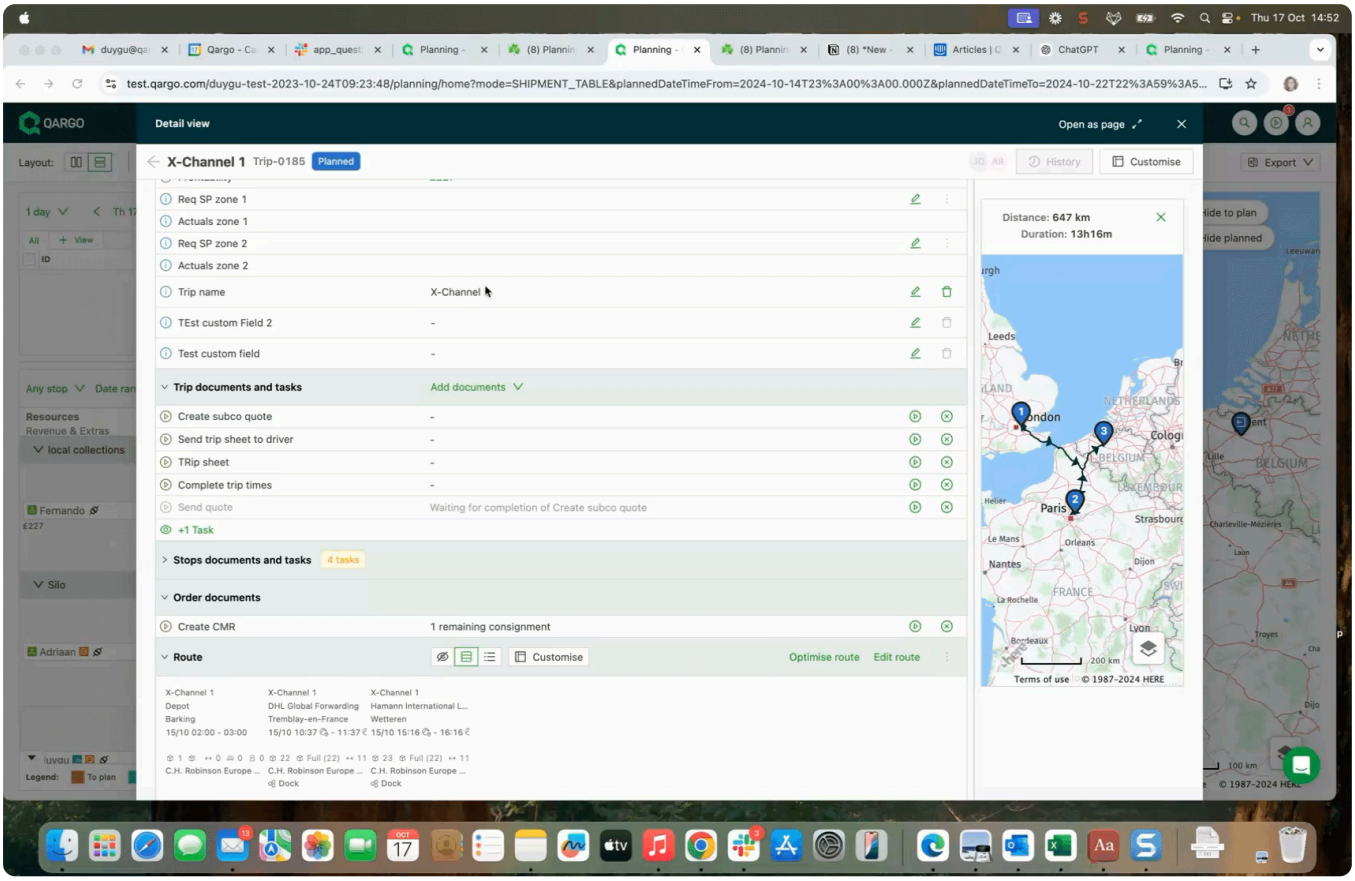
- **A+ Expanded View:** Shows all the enabled toggles in the selected view (Timeline / Table)



- **A- Condensed View:** Summary view showing reduced information.
  - Select which toggles to show separate to what is displayed in the A+ view.

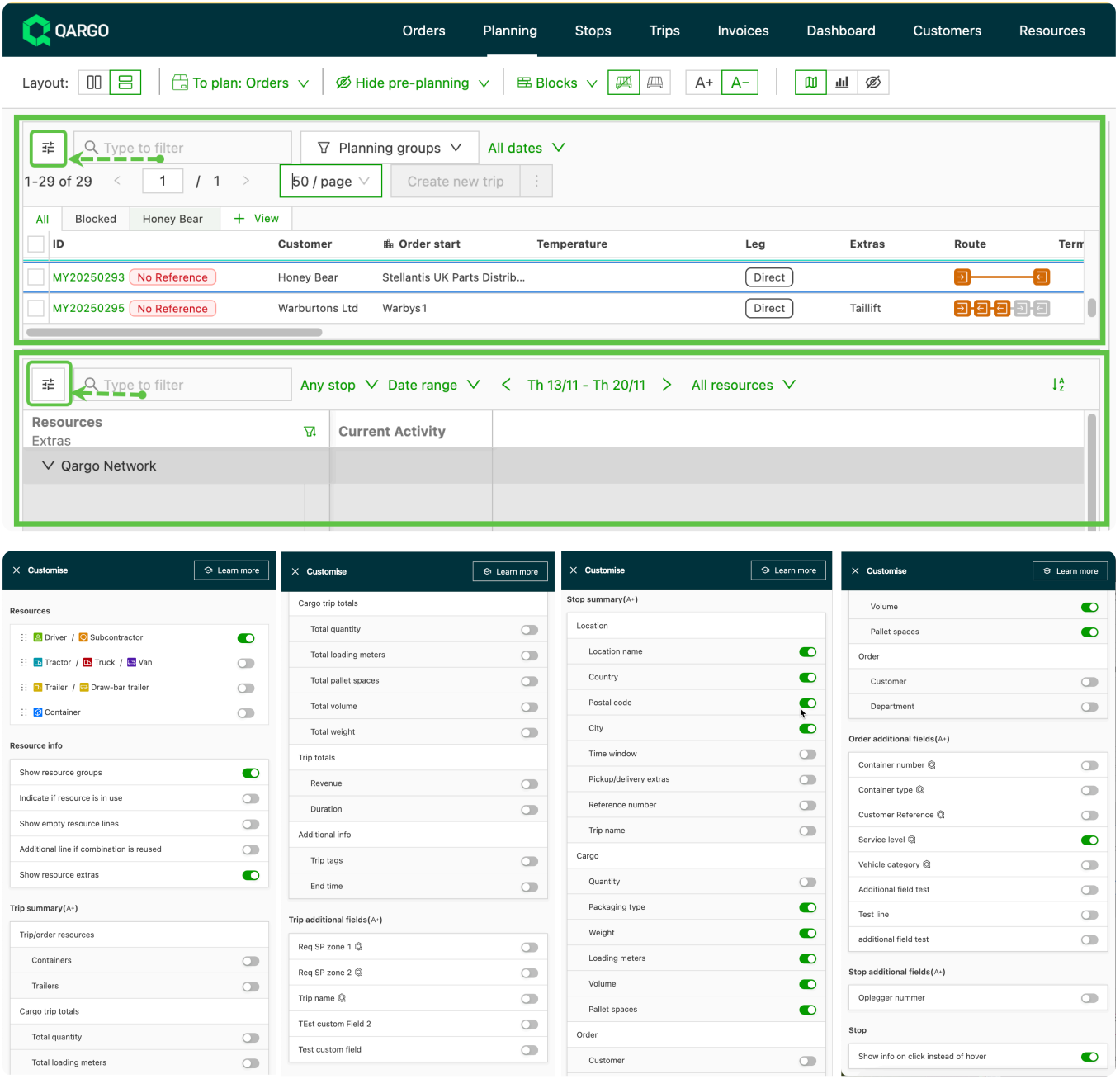


- **Trip / Order Detail Page:**
  - Modify toggles in the ***Customise views***, independent to what is selected to show in the Planning board.
  - Simplify the view and eliminate duplication of data that is already available in those screens.



PLANNING BOARD - Customise options

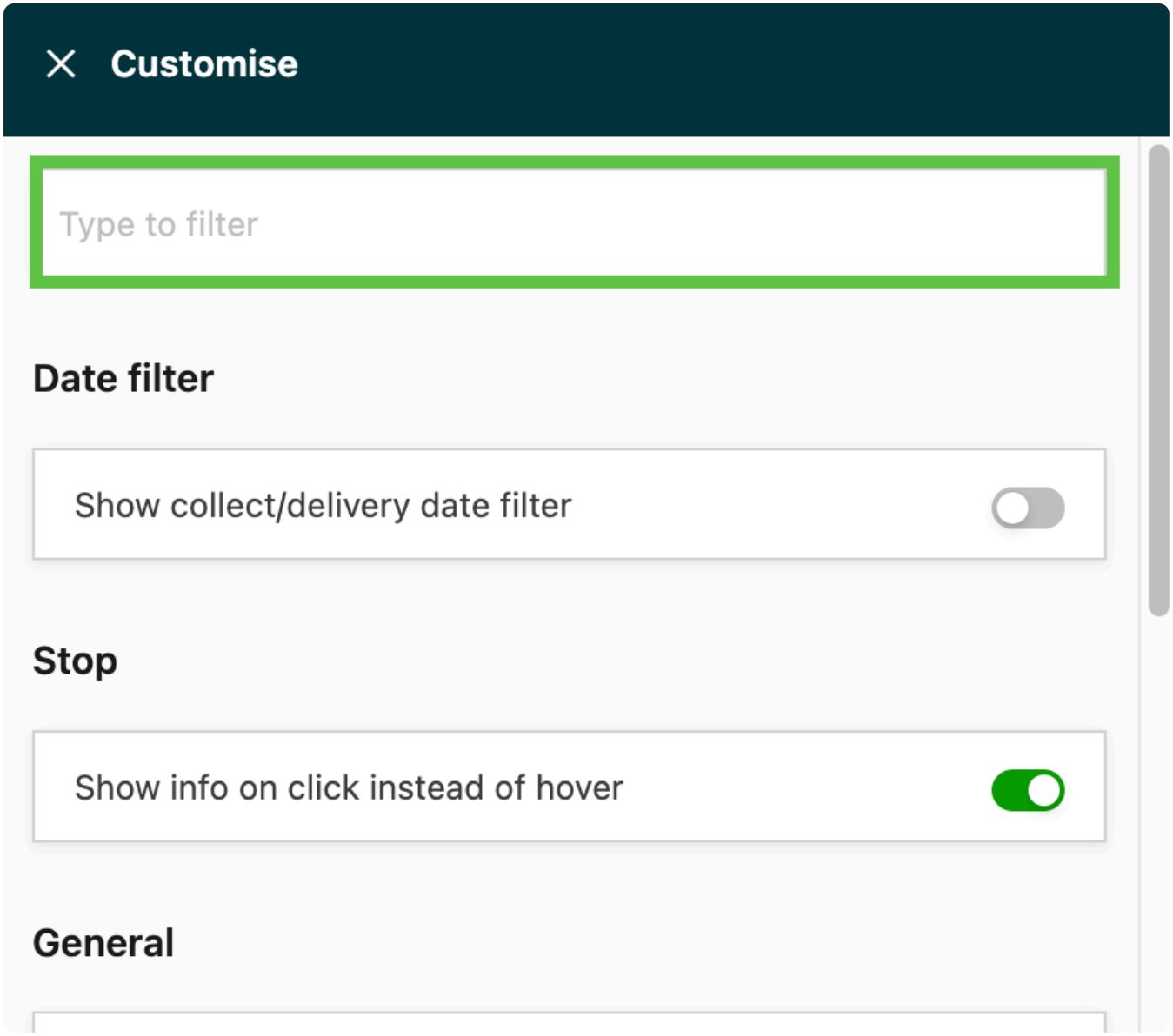
Use the ***Customise icon*** to open the customise menu for either the To Plan or the Plan Board views.



The customisation view ordered into logical groupings:

- Resources have been moved to the top and grouped with Resource Info.
- Trip Info details TOTALS over the whole trip (Cargo Trip Totals / Revenue / Duration)
- NEW options to include Trip Additional Fields (where configured)
- Stop info gives specific details relating to the individual stop (Location / Cargo / Order)
- NEW option to show DEPARTMENT if available on the customer order
- NEW options to include Order Additional Fields (where configured)
- NEW options to include Stop Additional Fields (where configured)

The Customise options include an option to search for the specific piece of data.



Customise Toggles

Resources:

- Driver / Subcontractor
- Container
- Trailer / Draw-bar trailer
- Tractor / Truck / Van:

Q: The vehicle registration number isn't shown next to the driver
A:Toggling on 'Tractor / Truck / Van' or/and 'Trailer / Draw-bar trailer' shows the vehicle's registration number.

1. Go to Planning and click **Customise**, at the top right.
2. Switch on the Tractor / Truck / Van or/and 'Traler / Draw-bar' toggle under Resources.
   The registration (licence plate) number now shows next to the driver.

▶ https://watchclueso.com/embed/ak0o4o1wcpn0yeky

Resource info:

- Show resource groups
- Indicate if resource is in use
- Show empty resource lines

- Additional line if combination is reused
- Show resource extras

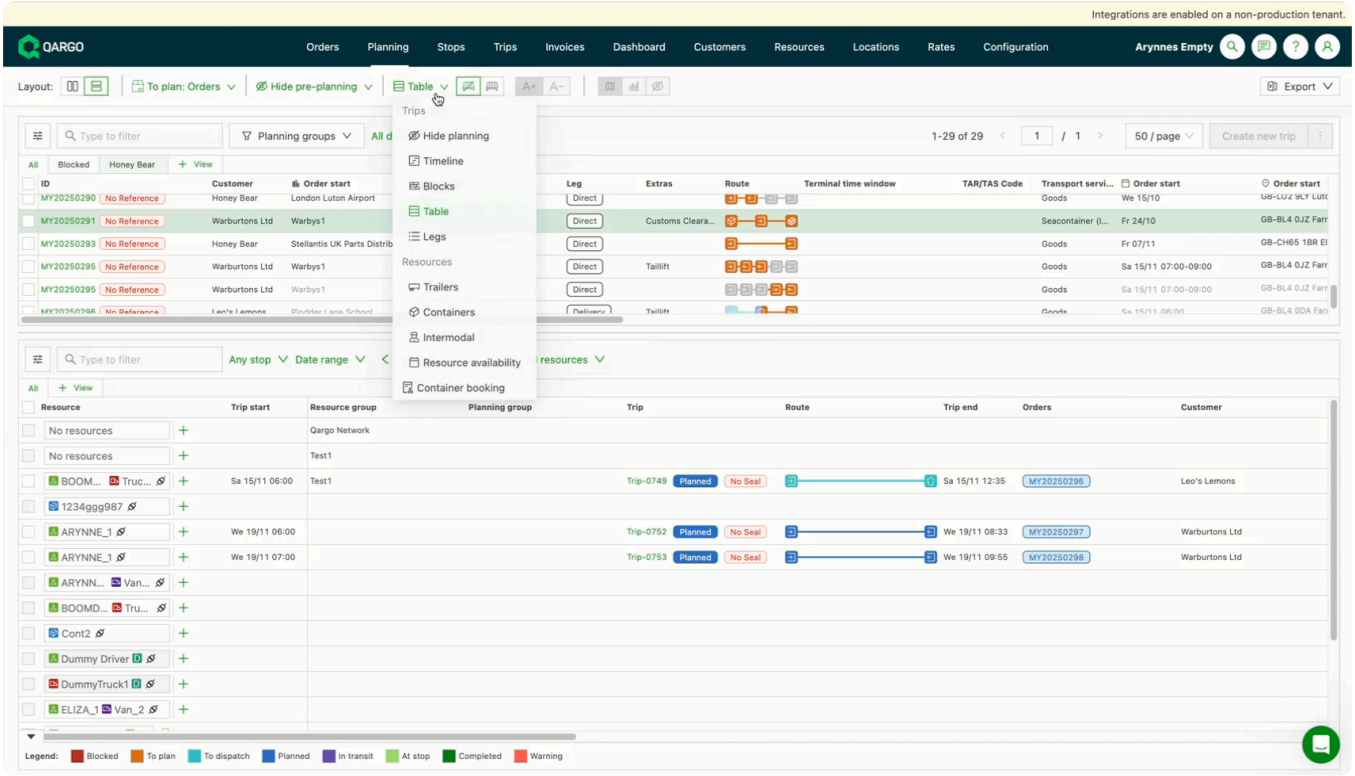
Trip summary(A+/A-): Will show which view is being customised.

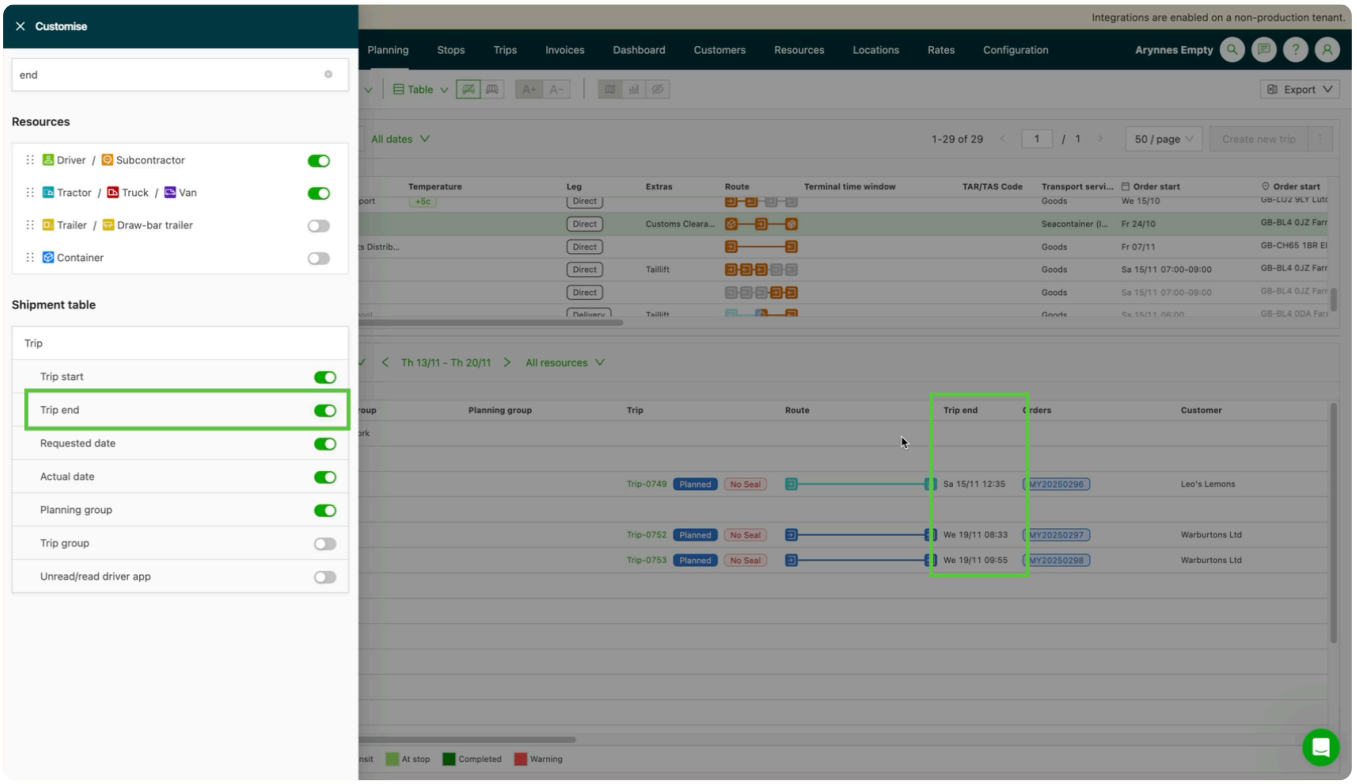




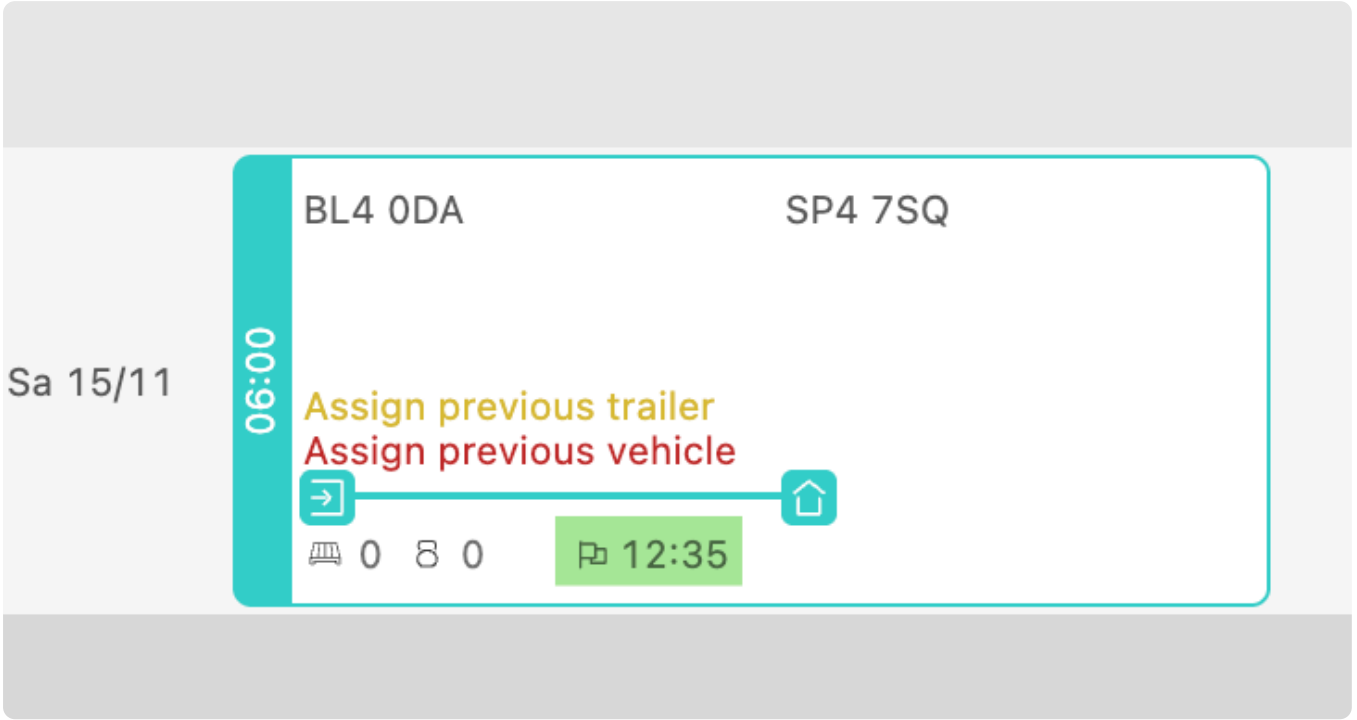
- Trip/order resources
  - toggles for all trip/order secondary resources (container/trailer/vehicle/driver)
- Cargo trip totals
  - Total quantity
  - Total loading meters
  - Total pallet spaces
  - Total volume
  - Total weight
- Trip totals
  - Revenue
  - Duration
- Additional info
  - Trip tags
  - End time

End Time:
Useful if using the TABLE view as it will display the time of the last stop, which can be filtered.





- End time can also show when using other views like Blocks or Timeline



Trip additional fields (A+/A-) ***NEW*** Trip Additional fields that are enabled in Configuration can now be shown.

- Trip Default fields
- Trip Custom fields

Stop summary (A+/A-)

- Location
  - Location name
  - Country

- Postal code
- City
- Time window
- Pickup/delivery extras
- Reference number
- Trip name

- Cargo
  - Quantity
  - Packaging type
  - Weight
  - Loading meters
  - Volume
  - Pallet spaces

- Order
  - Customer
  - Department

Order additional fields (A+/A-)*NEW* Order Additional fields that are enabled in Configuration can now be shown.

- Order default fields
- Order custom fields

Stop additional fields (A+/A-) *NEW* Stop Additional fields that are enabled in Configuration can now be shown.

- Stop default fields
- Stop custom fields

Stop

- Show info on click instead of hover

Cargo Metrics: Stop Totals on the Planboard

To give planners clear visibility of cargo utilisation across a trip, enable the 'Customise option' to **display cargo totals per stop or the remaining occupied space after each stop. P**lanners can quickly assess available capacity throughout the journey and make more efficient planning decisions.

Three visualisation modes are available:

1. **Cargo: Total Loaded / Unloaded per Stop**
   - This is the existing cargo metric (renamed).
   - Shows how much cargo is loaded or unloaded *at each stop*.
2. **Cargo: Space Occupied After Stop**
   - Shows the total space occupied *after* the loading/unloading activities at that stop.
   - Allows planners to track utilisation progression across the entire trip.
3. **Cargo: Capacity Utilisation After Stop**
   - Shows the space occupied after the stop against the trailer's total capacity (for example 10.56 / 11.8 LDM), in red when exceeded.
   - See: PLANNING — Live Cargo Totals on Trips Without Saving.

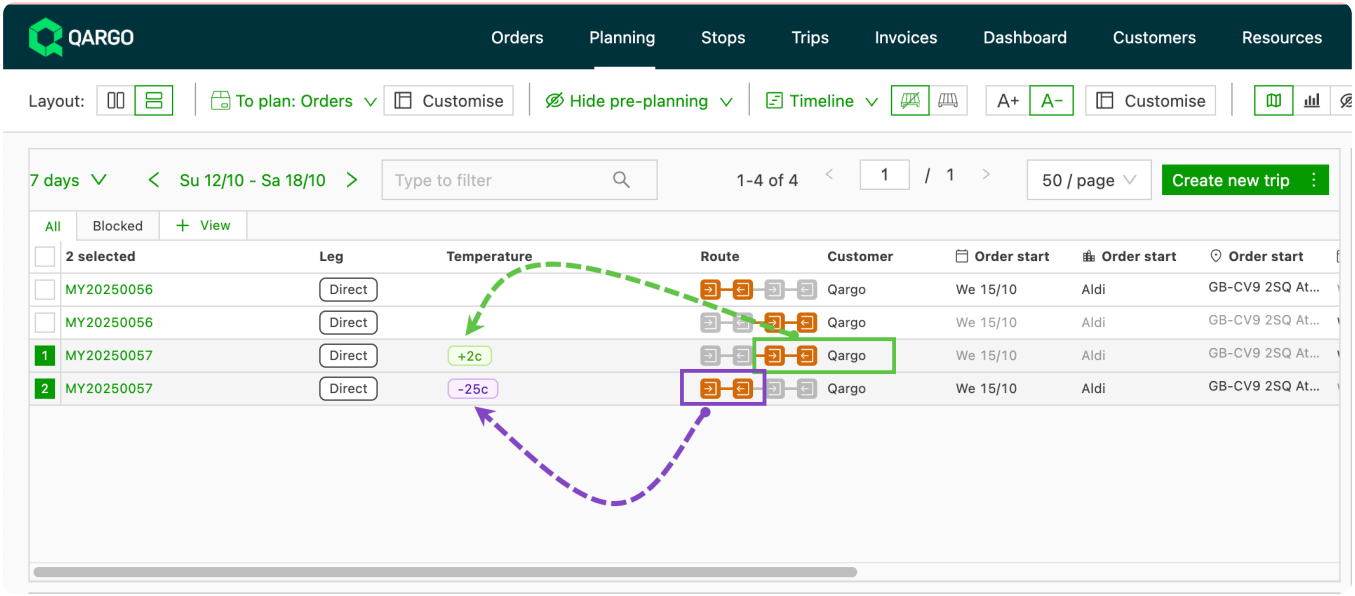
Users can switch between these modes via the **Planboard Customisation settings**.

- **Improved visibility of capacity across the trip**
  Planners can easily see how much space is available at any point, enabling more accurate and confident planning.
- **Faster and more efficient decision-making**
  With utilisation shown directly at each stop, planners can immediately identify where additional cargo can fit or where overloading risks may occur.
- **Better trip optimisation**
  Understanding capacity changes stop-by-stop helps planners optimise routing, stop order, and cargo distribution.

Display Custom Fields by Cargo

- Custom fields are now displayed **against each consignment** (i.e. per trip) when the consignments are split into separate trips.
- This gives planners the visibility needed to group consignments with compatible attributes and avoid shipping conflicts.

1. **Custom fields tied to Cargo details** can now appear in the Trip Planning view.
2. Use the **"Customise" button** to add these cargo-level custom fields as table columns.
3. Use the **"Plan onto separate trip"** option to split out individual consignments into their own trip rows.
4. Once split, **custom fields display per consignment**, so you see the correct values in each trip row.



Use Cases

- Suppose you have a custom field **"Temperature Requirement"** on the cargo level.
- An order is submitted containing three consignments:
  - Consignment A: requires 2–4 °C
  - Consignment B: requires –20 °C
  - Consignment C: ambient
- After splitting into separate trips, you'll see those different temperature values directly in the planning table, enabling you to group compatible consignments together (e.g. A with C, but B separate).

📚 This functionality is already in place for default fields, like weight for instance.

Limitations & Notes

- This feature applies only in the **Trip Planning** view — not in other order or consignment views.
- Only custom fields defined **at the Cargo/Consignment** level will show using this method (fields at the order level will still operate as before).
- If a consignment hasn't been split into its own trip, it may continue showing a default or blank value until the split occurs.