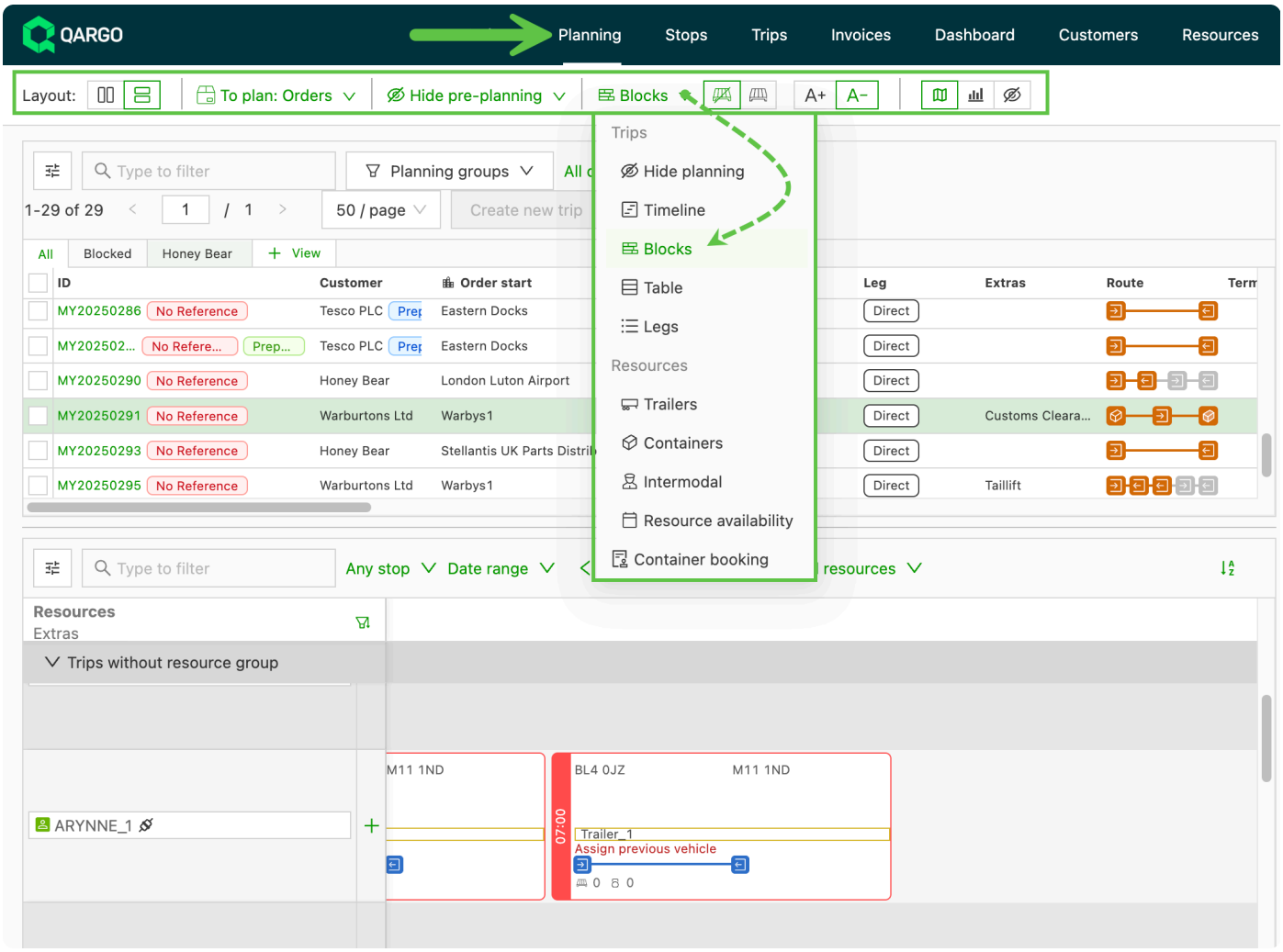
Planning - Planning view options

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

Updated May 20, 2026

To start planning orders, switch to the Planning page as shown below (also see 👉**Plan load**). The Planning page offers multiple ways to visualize and manage loads. Each view is designed to meet the specific needs and preferences of the user.

- Timeline view
- Blocks view
- Table view
- Legs view



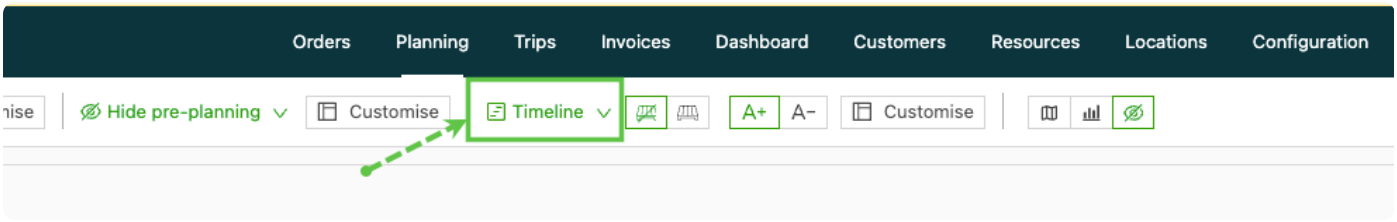
In addition to the load planning board views, loads can also be viewed by resources that might require specific planning, such as containers or intermodal bookings.

The view can also be customized based on what the individual user needs to see or work on.

Click here to see the customization options available in different views.

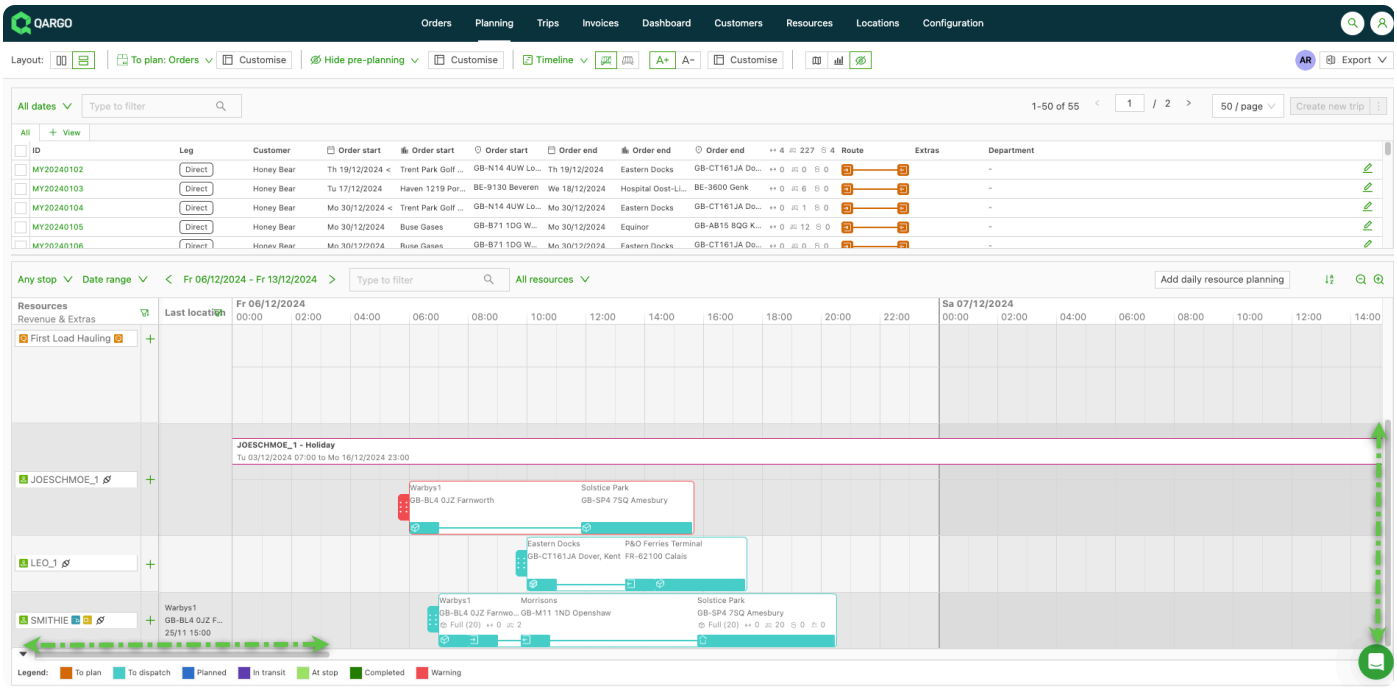
Timeline view:

The Timeline view provides a comprehensive chronological representation of all the loads that have been made. It can be used to analyze the sequence and timing of loads over a period.

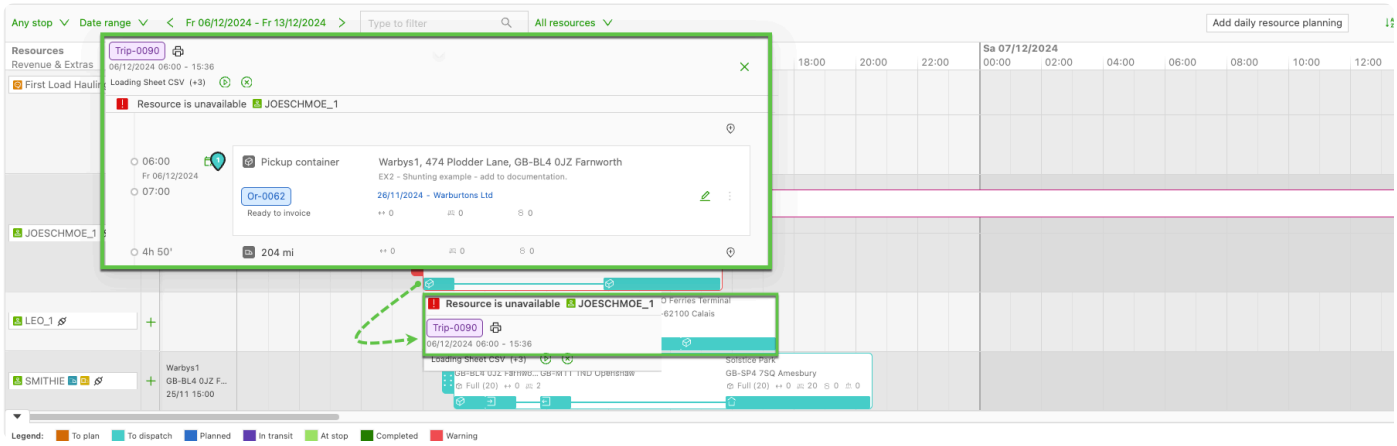


To navigate and use the Timeline view, follow these steps:

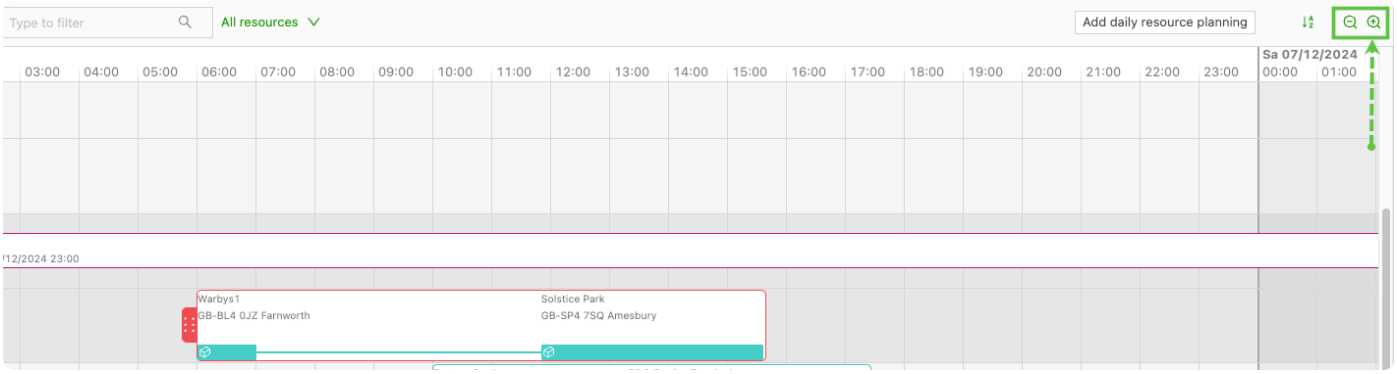
- Scroll horizontally or vertically to move through the timeline.



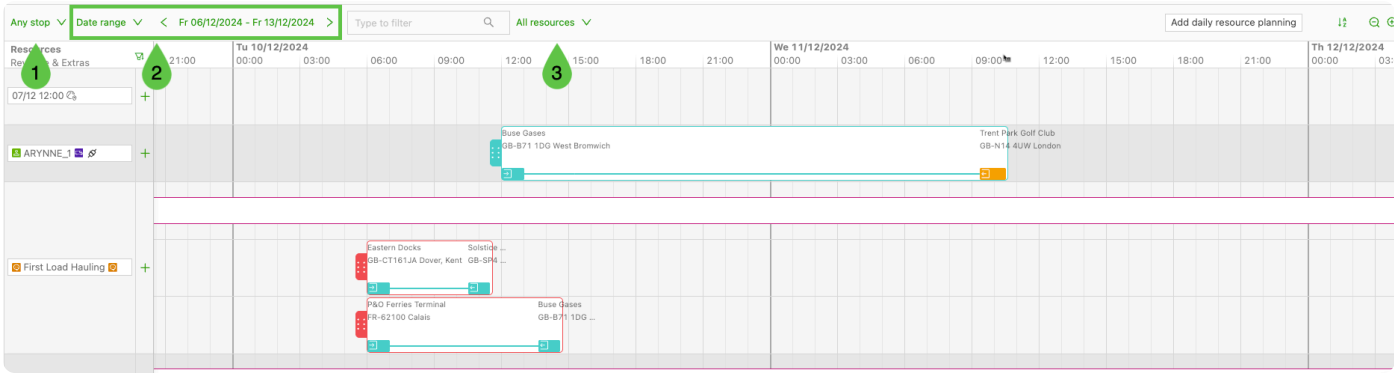
- Click a load or hover over it to access detailed information about it.



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



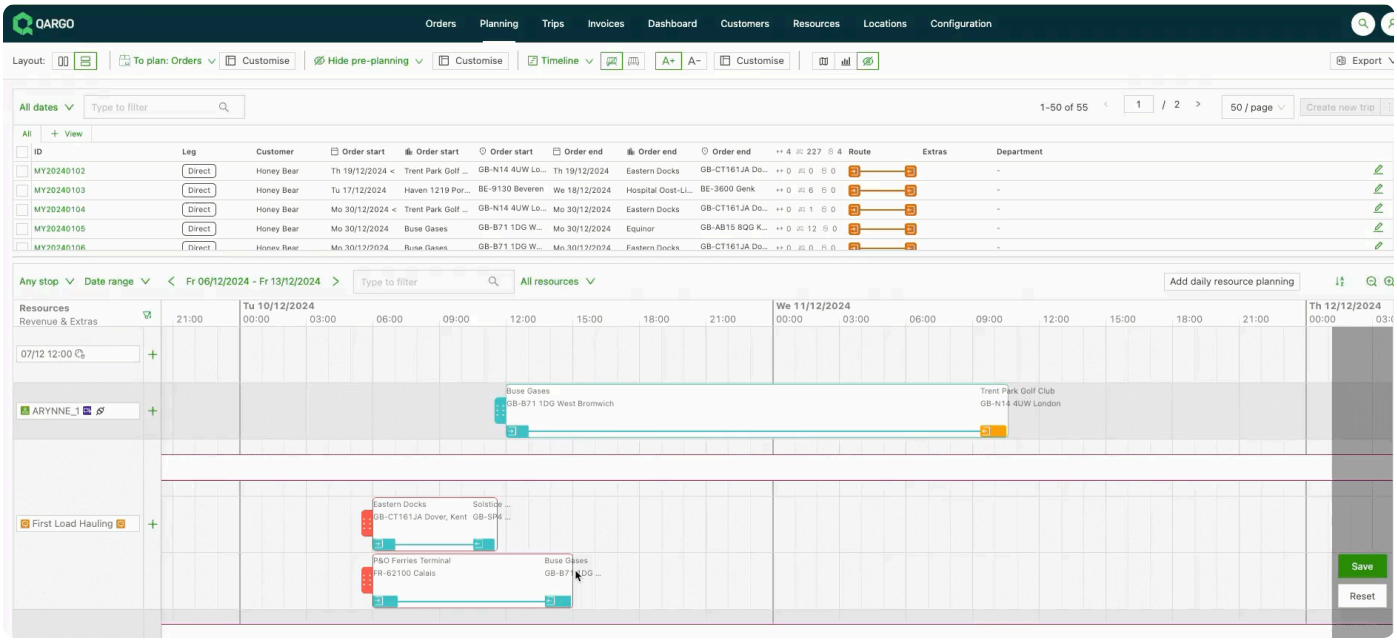
- Use filters, if provided, to narrow down the display based on specific criteria. The user can select the time interval and date interval, and filter on a specific resource, load number, ZIP code or location. Where applicable, the user can also filter on a 🔮**Resource group** that the user is responsible for.



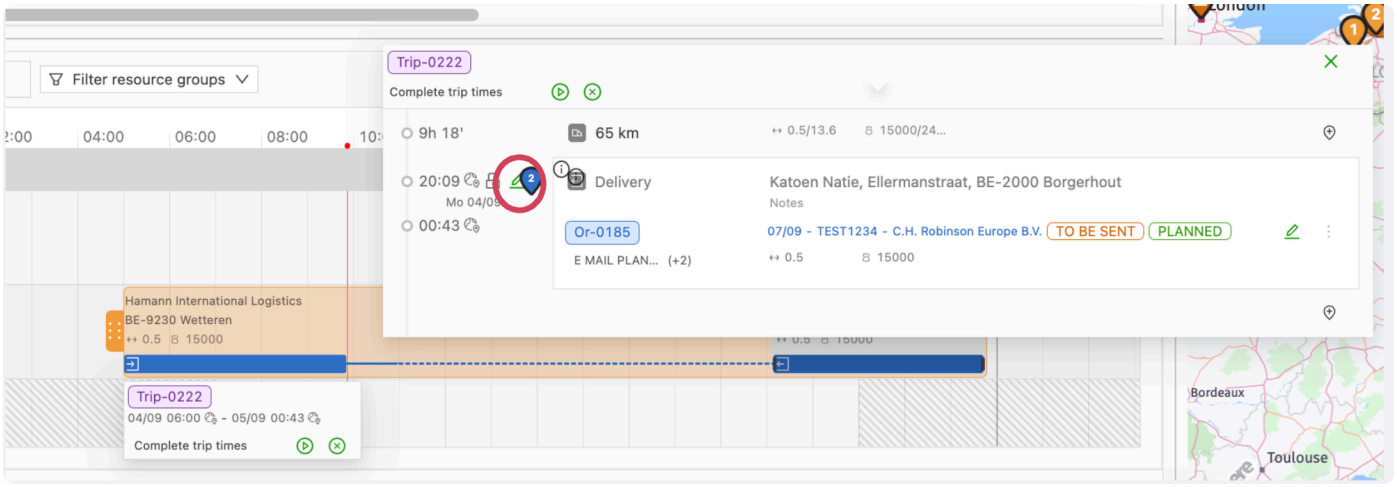
1. Select the time interval to view
2. Select the date range option and the date range to view
3. Use the filter option to search for specific resources, loads, ZIP codes or locations

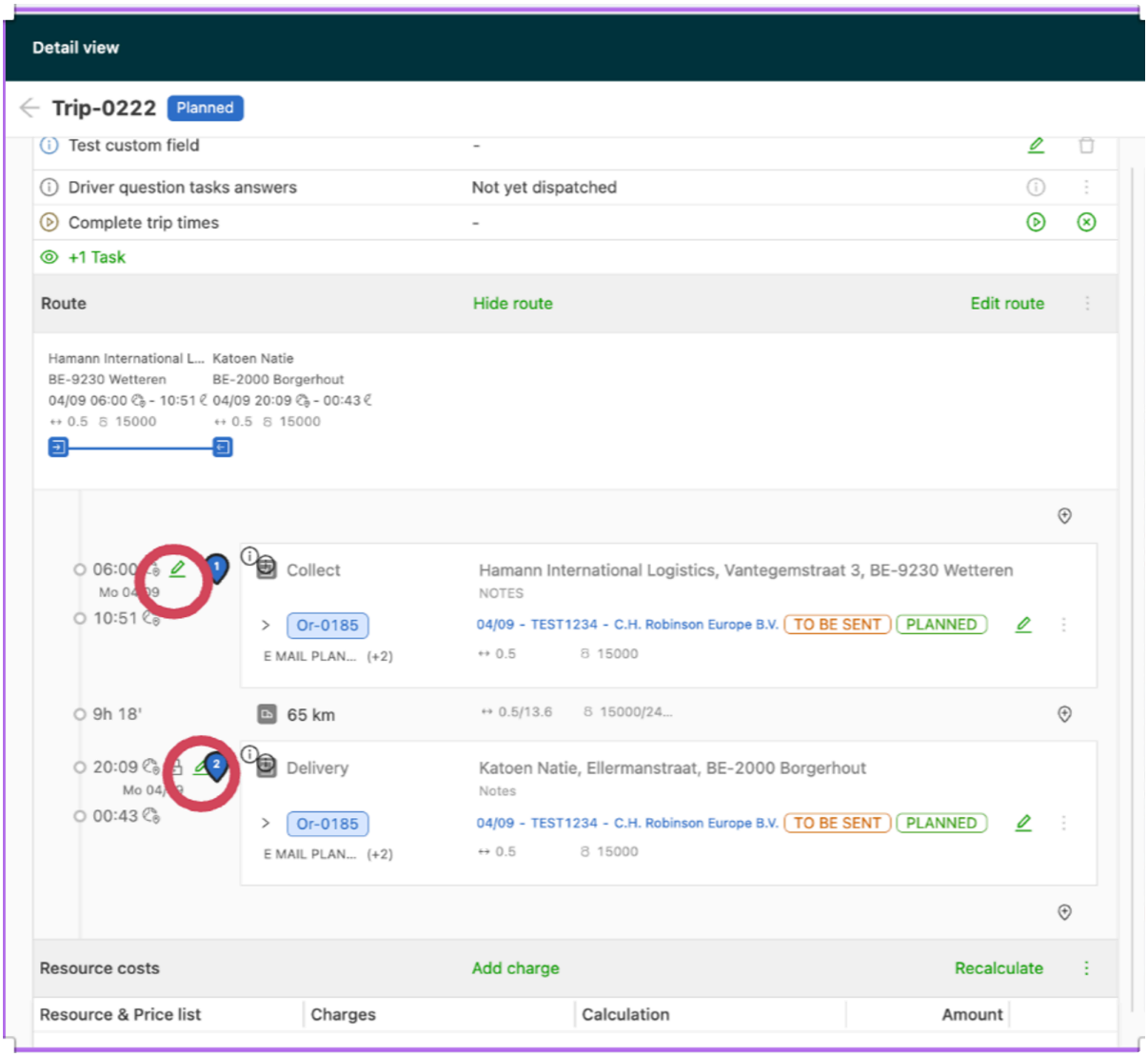
For more information about resource groups, see: 🔮**Resource groups**

In the Timeline view, the start and end times of a load or its stops can be adjusted. Drag the stop to the left or right as shown below. Once adjusted, click **Save** to update.



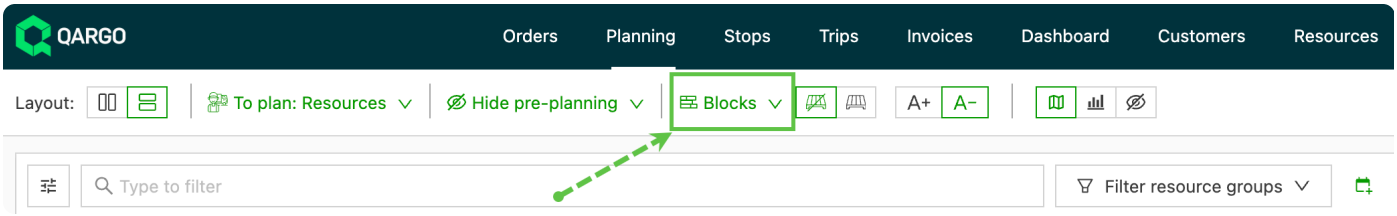
To view the time details of a load, hover over the load. The hour details can also be adjusted from the small overview pop-up or from the load page.





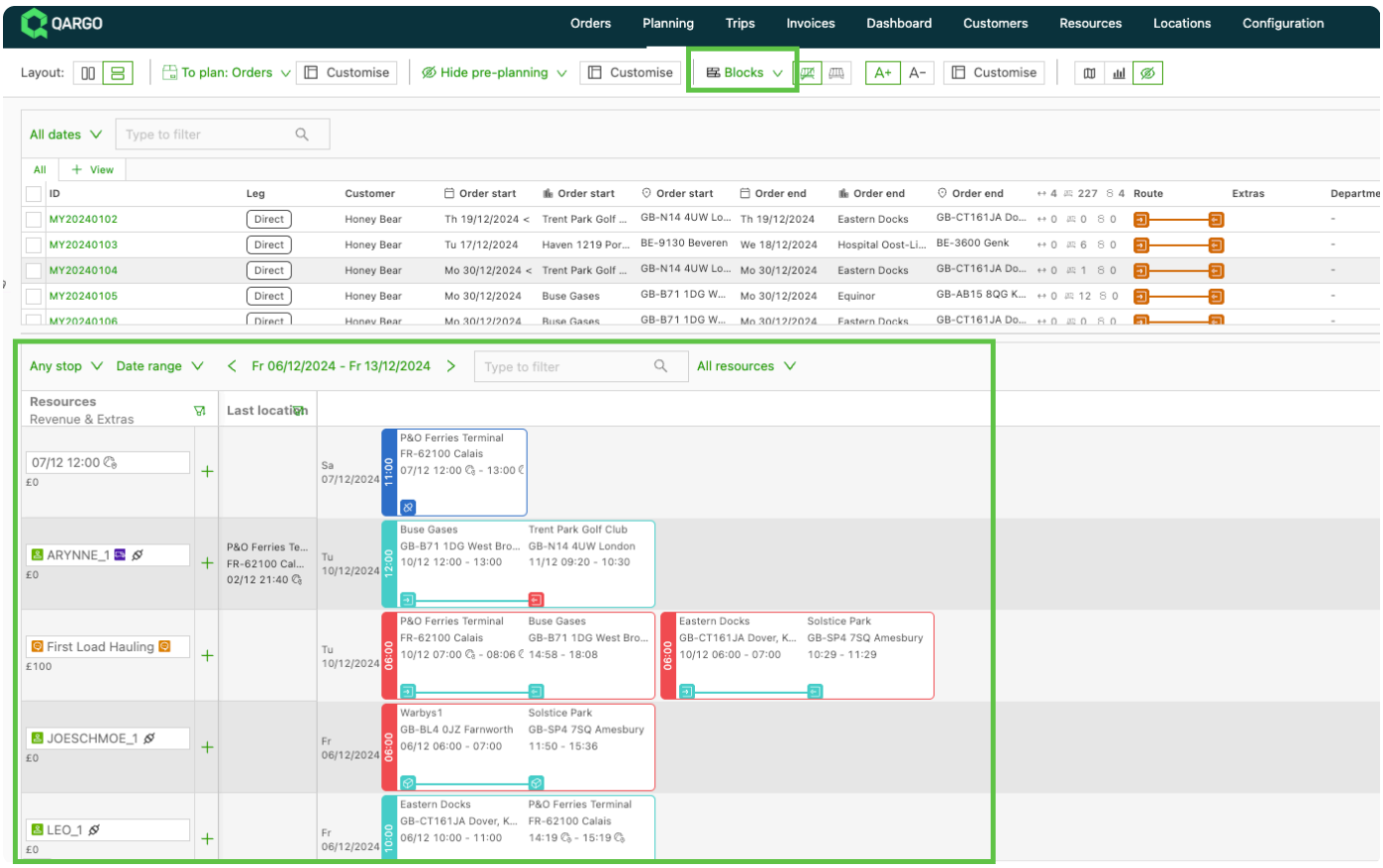
Blocks view:

In the Blocks view, the focus shifts from precise timing to a more visual, board-like representation of loads.

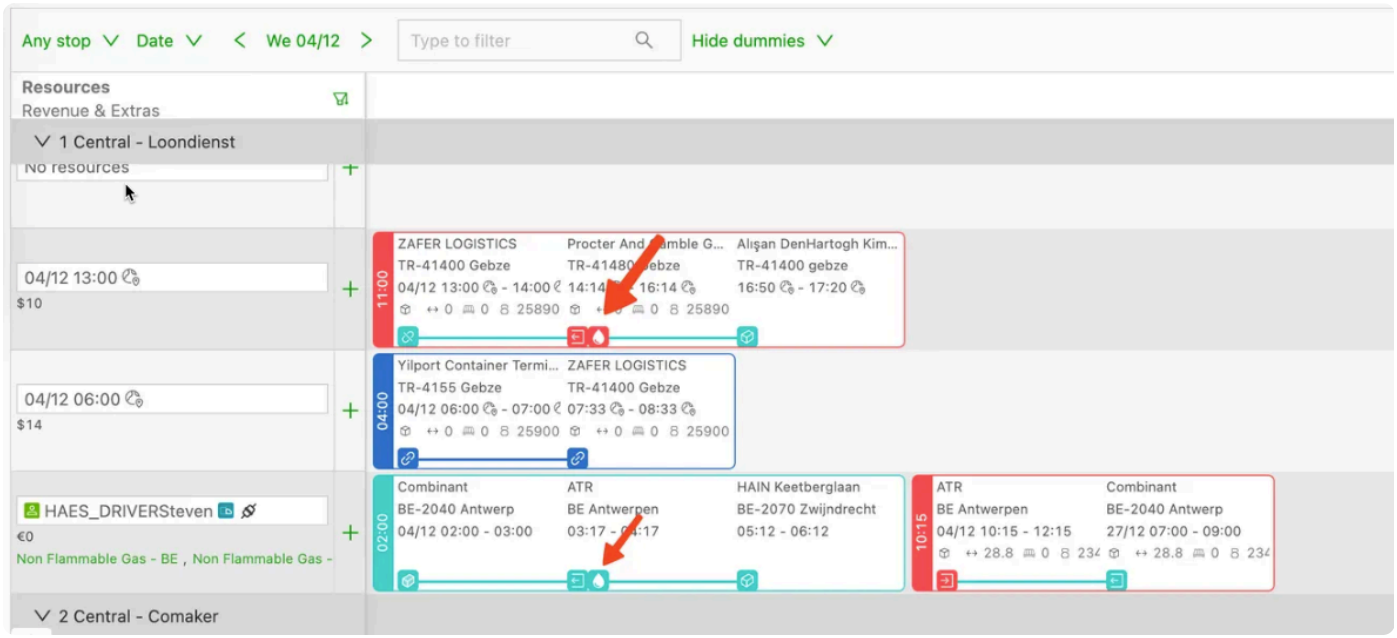


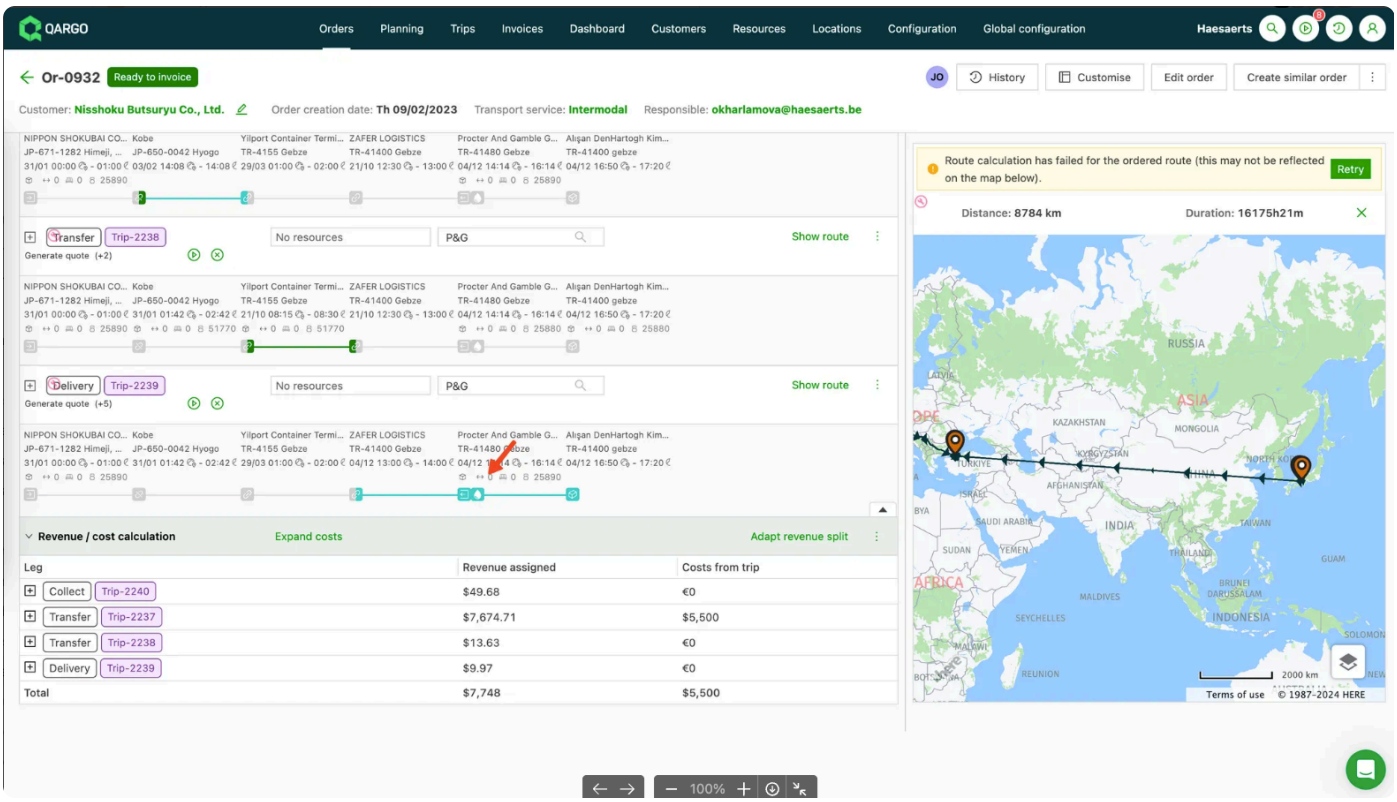
This view gives a quick overview of loads and their statuses. To use the Board view effectively, follow these guidelines:

- Loads are organized as cards on a virtual board.



The ***Blocks view*** on the planning board shows all relevant stop activities on a load. The order and load route display the individual stop actions for improved transparency. This is particularly useful where multiple actions are scheduled at the same stop, i.e.: Delivery / Pickup.

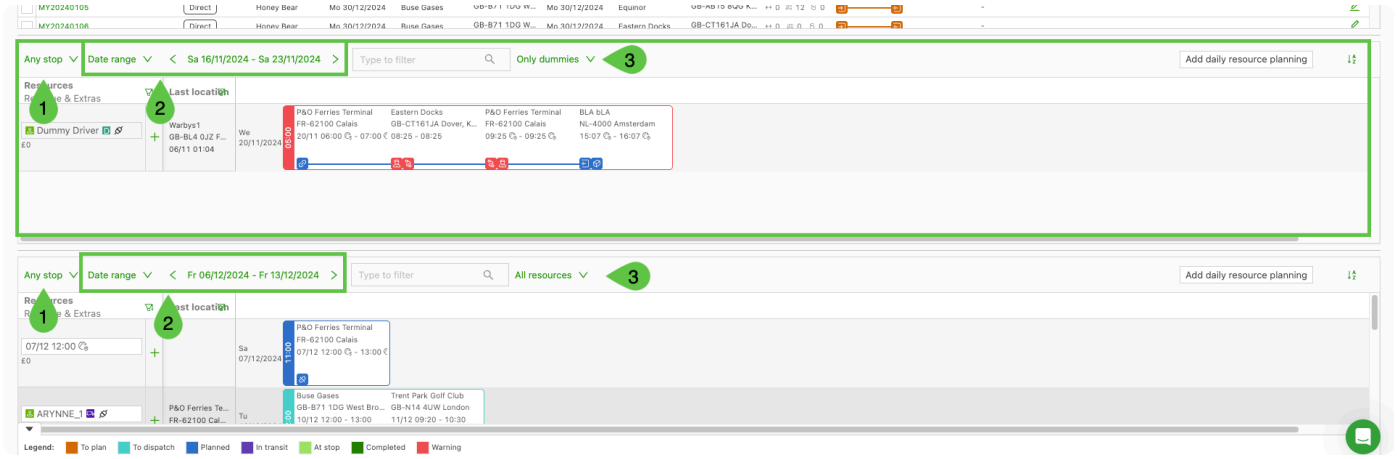




- When **planning a load** with the orders, drag and drop load stops to rearrange them or update their status. The same can be done from the load page via the ***'edit order'*** option.

▶ 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 the date range to view
3. Use the filter option to search for specific resources or resource groups, loads, ZIP codes or locations

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

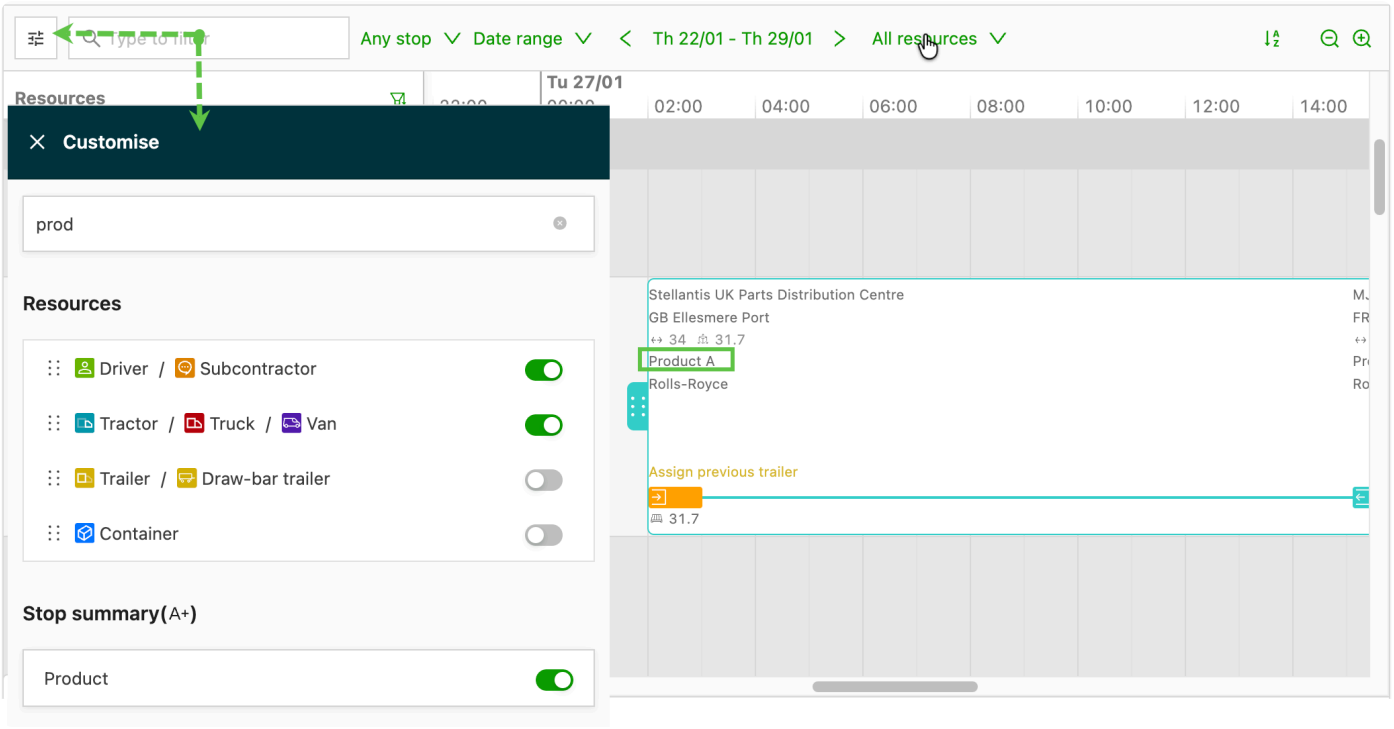
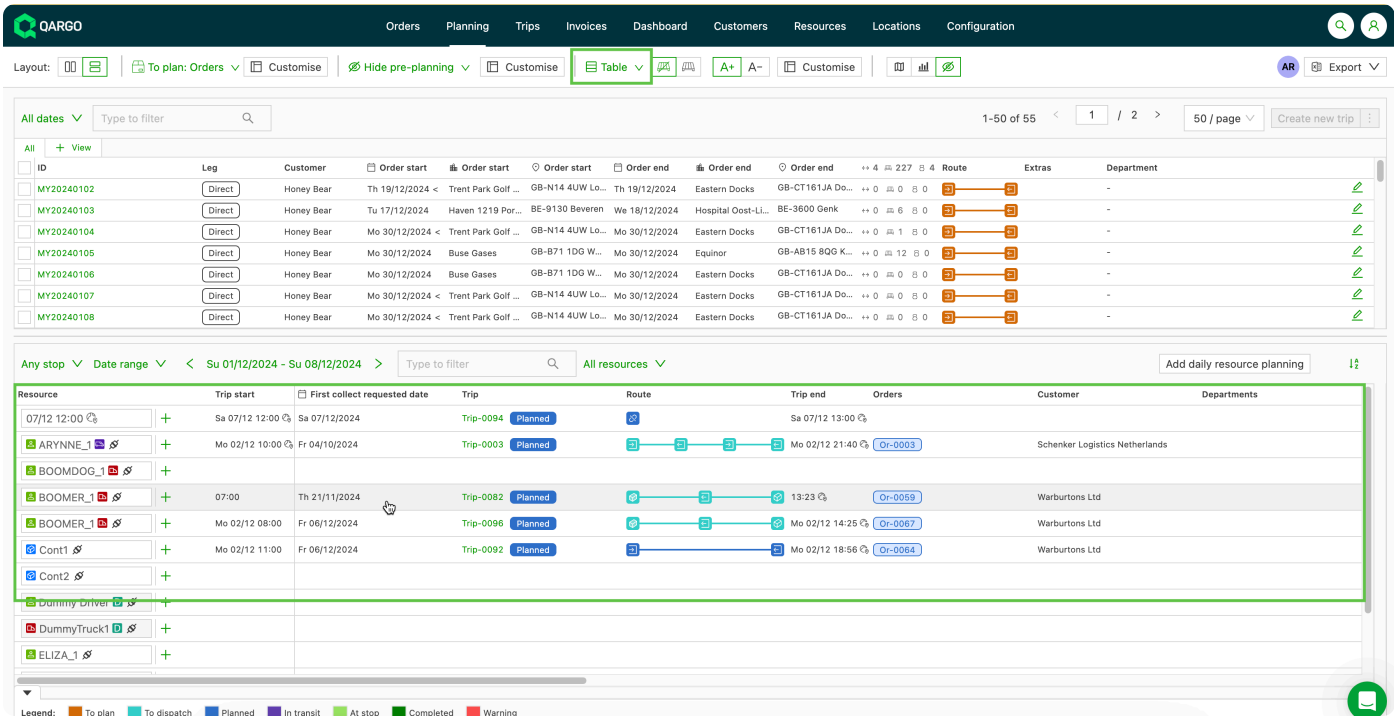


Table view

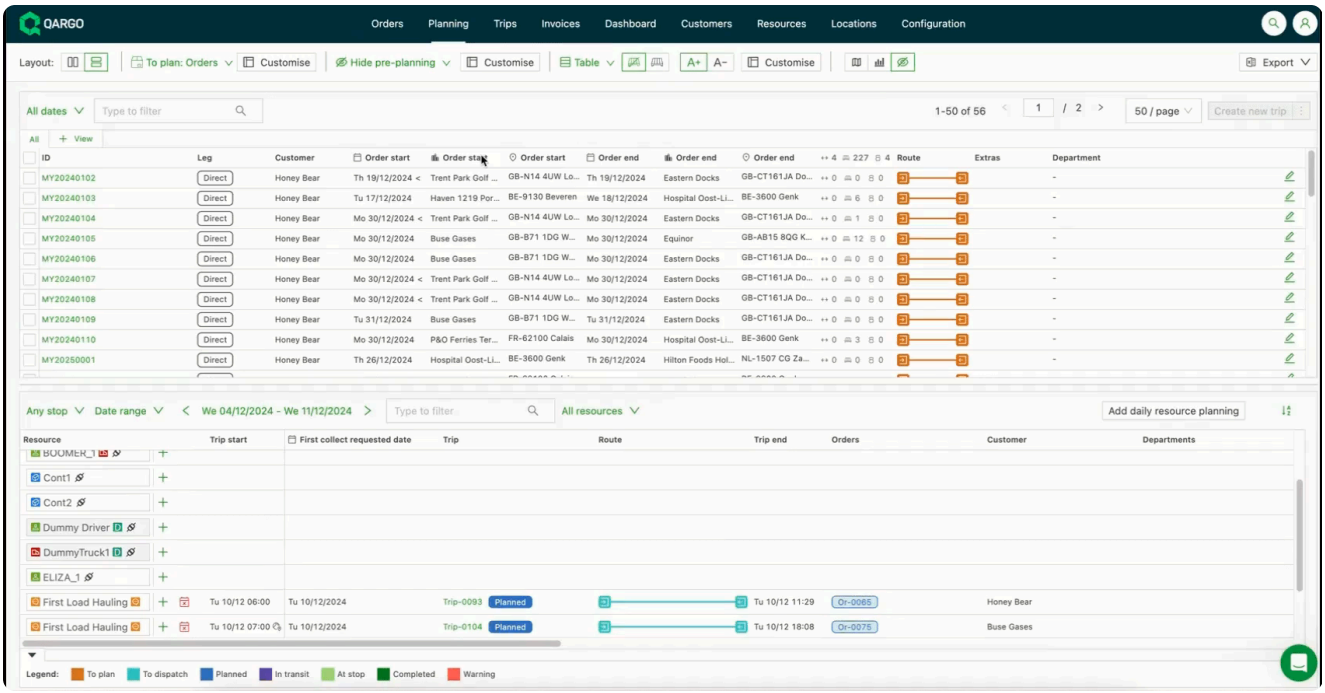
This new view presents the planning board in a compact table format. It helps transportation companies with large-scale planning keep a tidy overview. The columns make it easy to scan the information quickly.



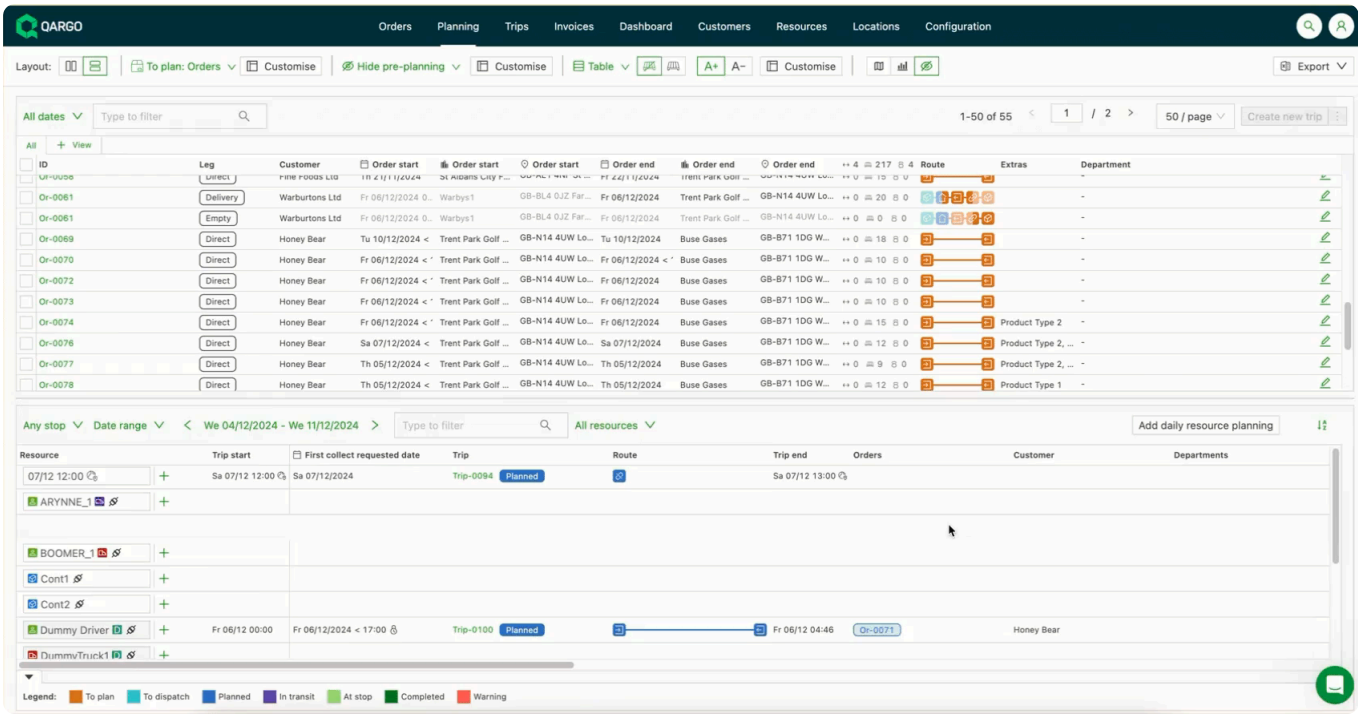
Each row represents a load or a reservation. Most drag-and-drop interactions are supported.

- Order to plan → Loads: table: Create a new load or add to an existing load.

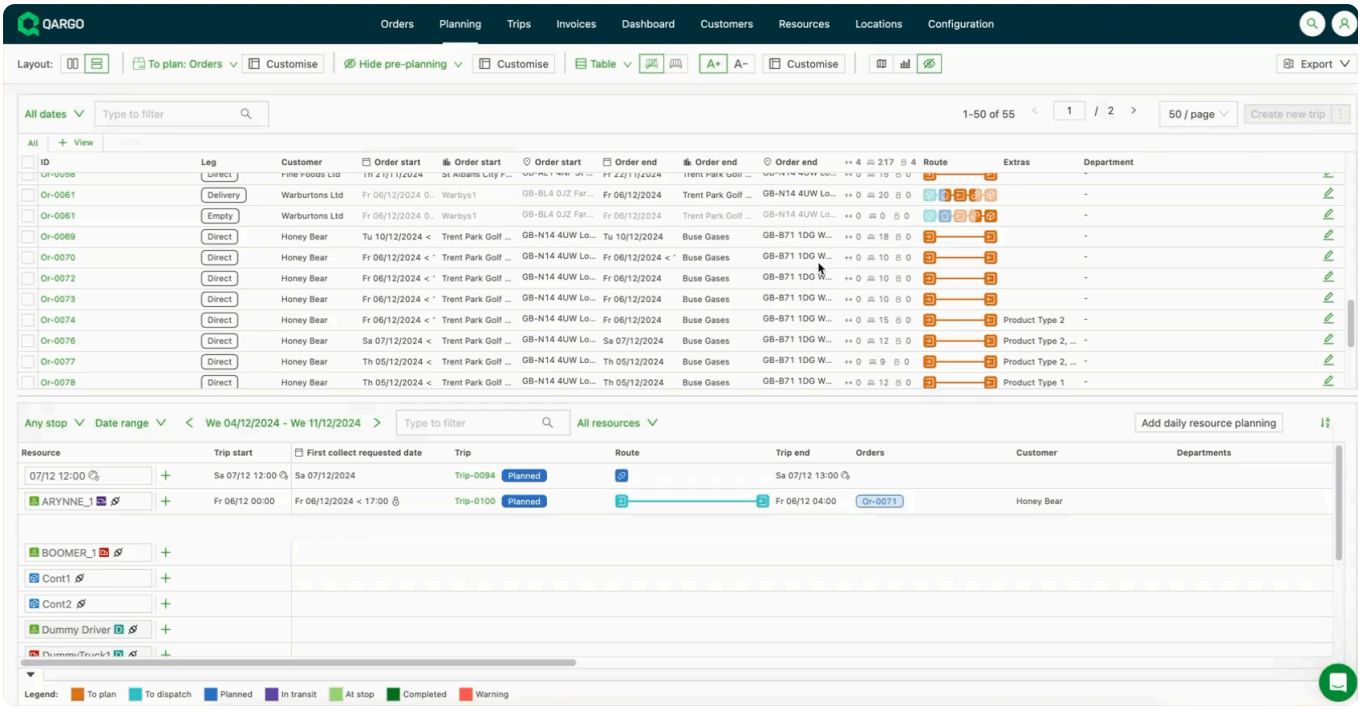
- Create load: The user can set a start timestamp
- Add to existing load: The user can drag the stops into the planned shipment and reorder the stops.



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



- Loads: table → Order to plan: Unplan the load



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

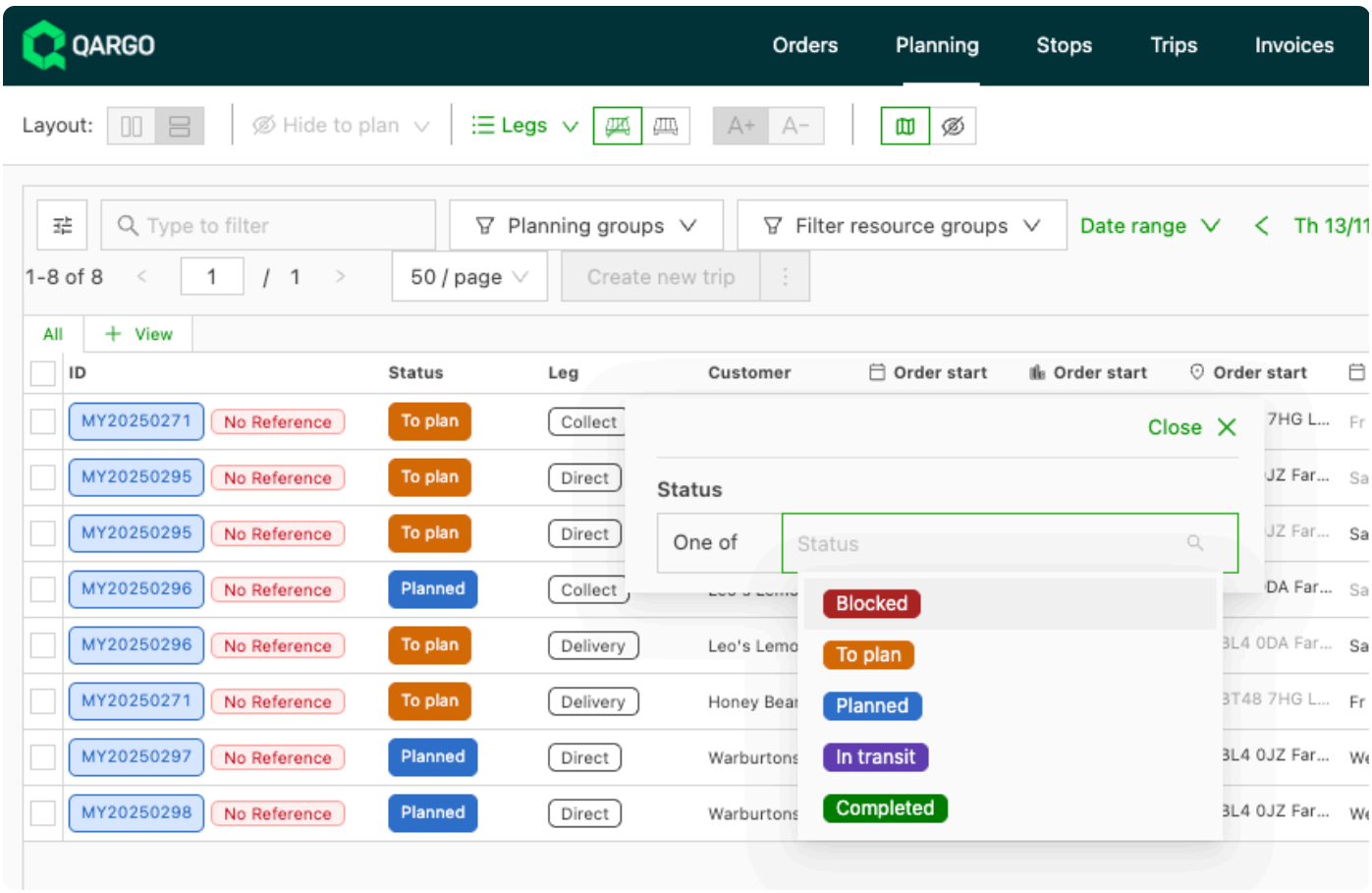
Leg view (orders overview):

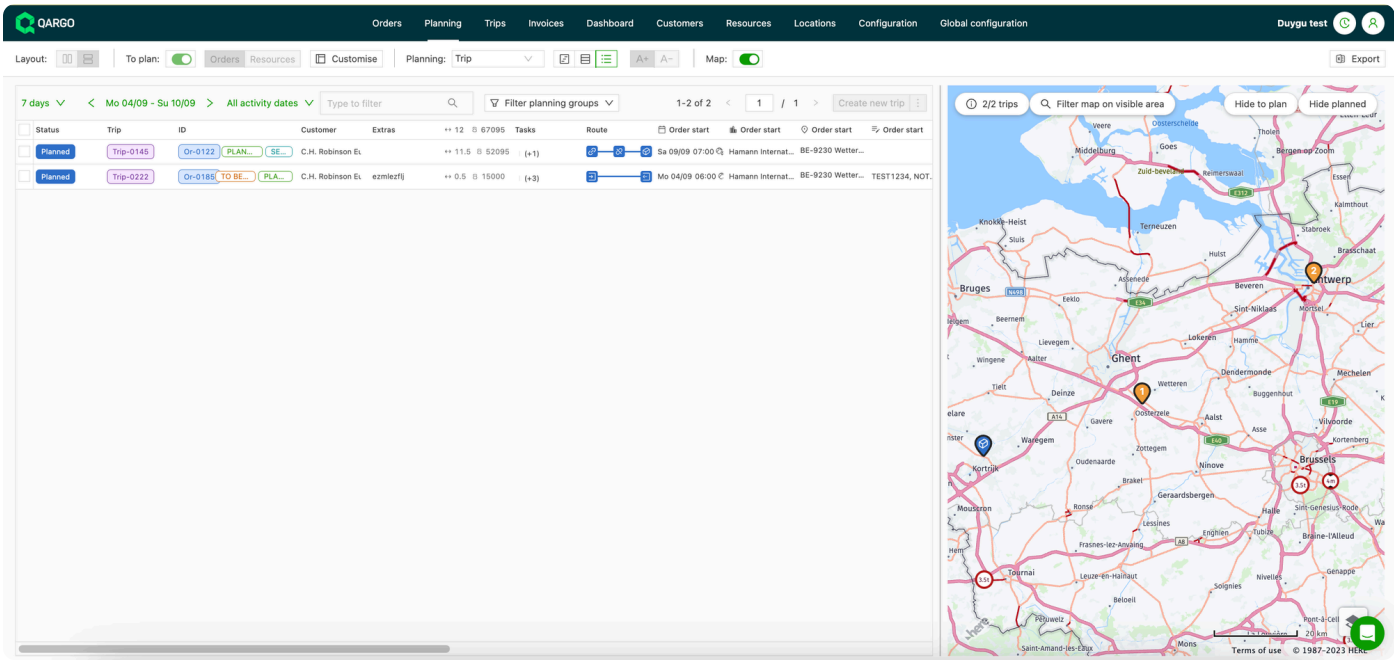
The Leg view presents a consolidated list of all orders, with their corresponding status:

- To plan
- Planned
- In transit
- Completed

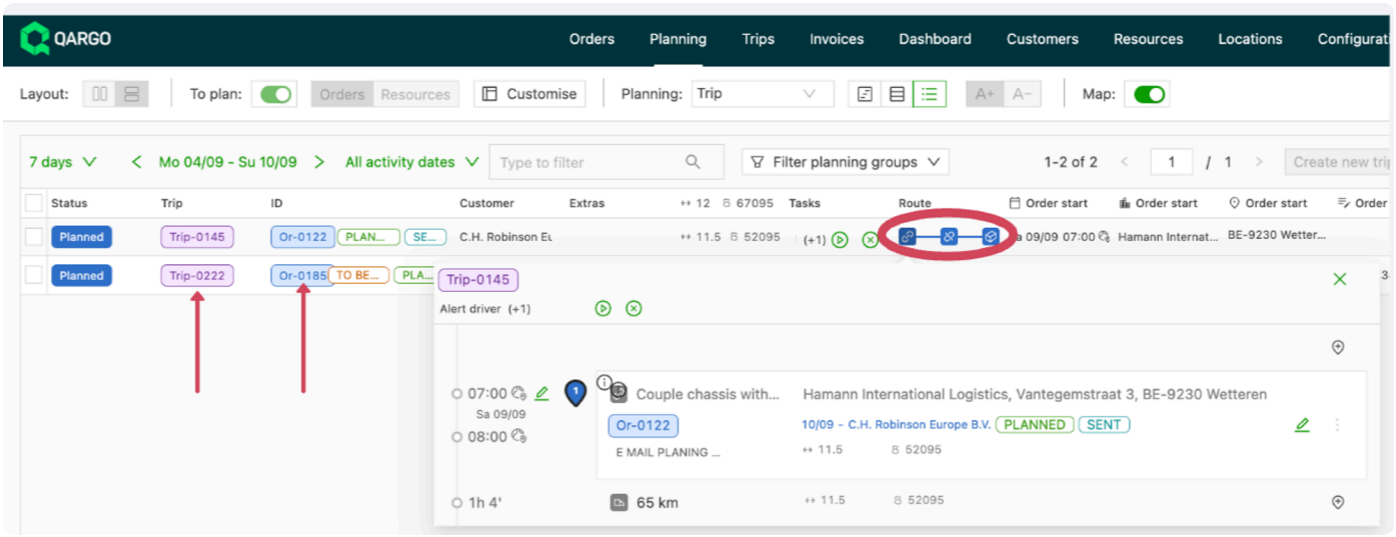
This view is ideal for a complete understanding of the underlying orders driving the loads. To make the most of the Legs view, follow these steps:

- Scan through the list to see all orders associated with loads. Filter on the status of the orders, use the personalize option to broaden or limit the information shown per order/load, and visualize these on the map:



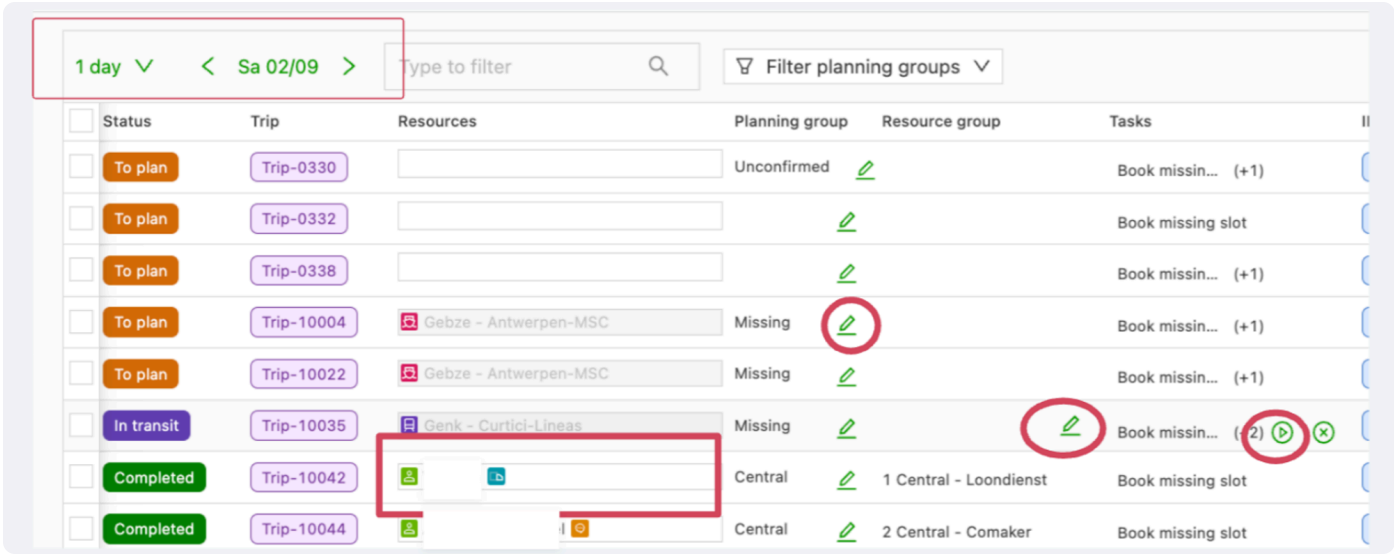


- Hover over the route view to see more details, or click an order number or the load number to access more details:

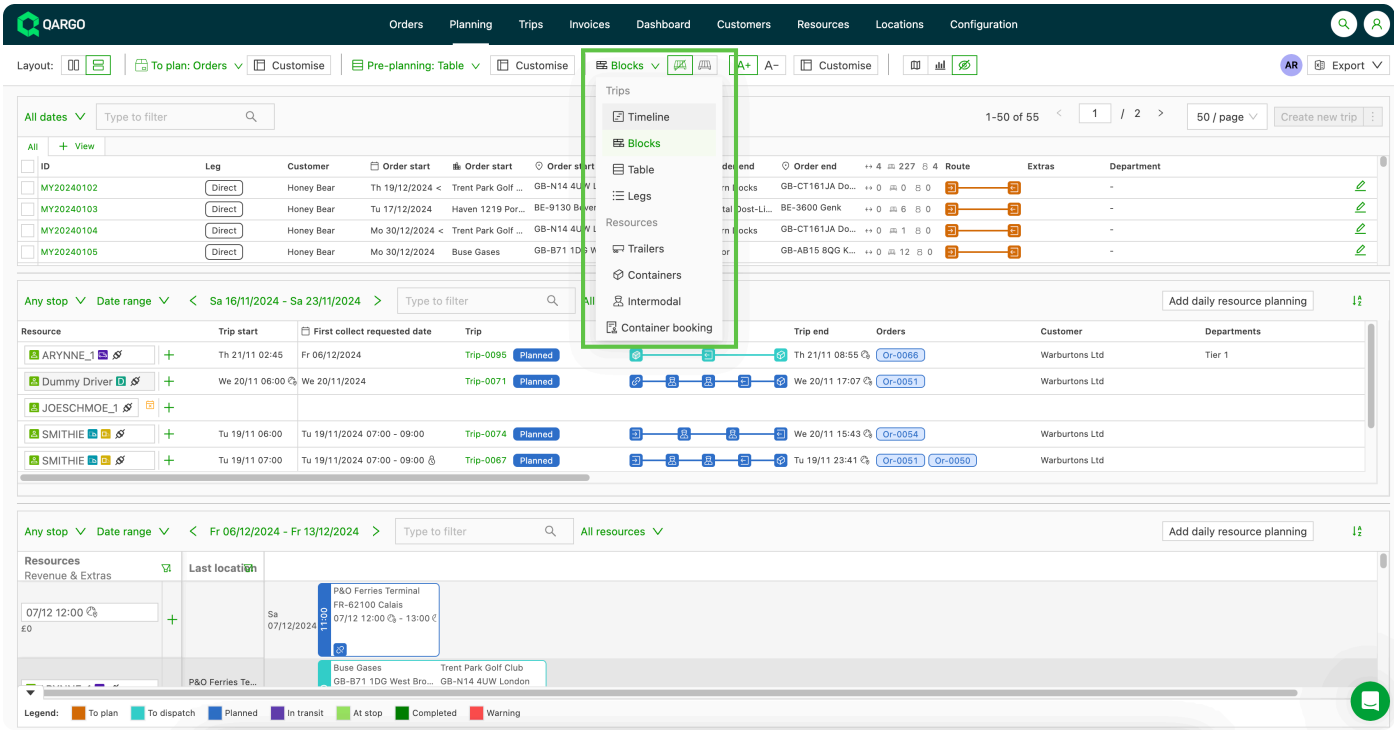


From the Leg view, it is also possible to

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

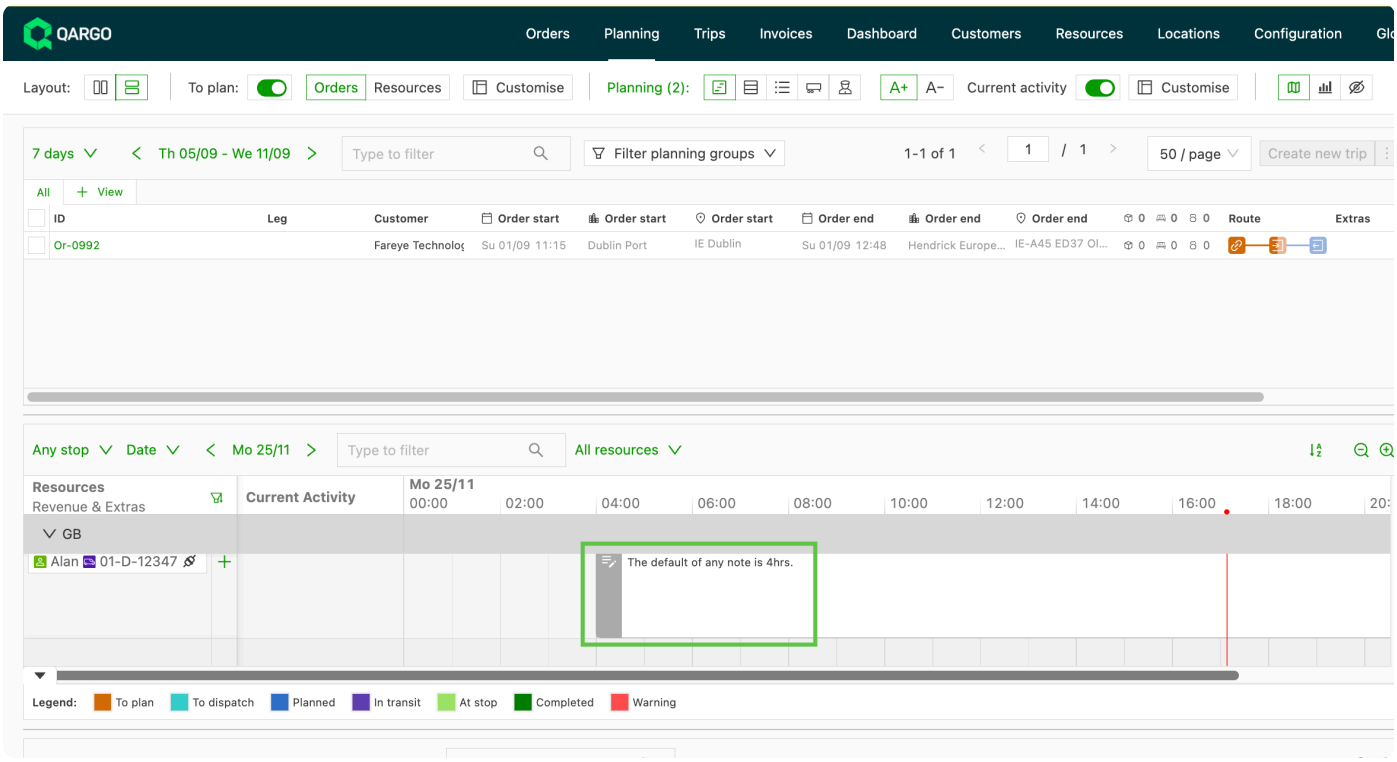


It is possible to switch between planning views based on the current task and preferences. Simply select the new view in the drop-down menu. Each view offers a different perspective to help manage loads and orders efficiently.

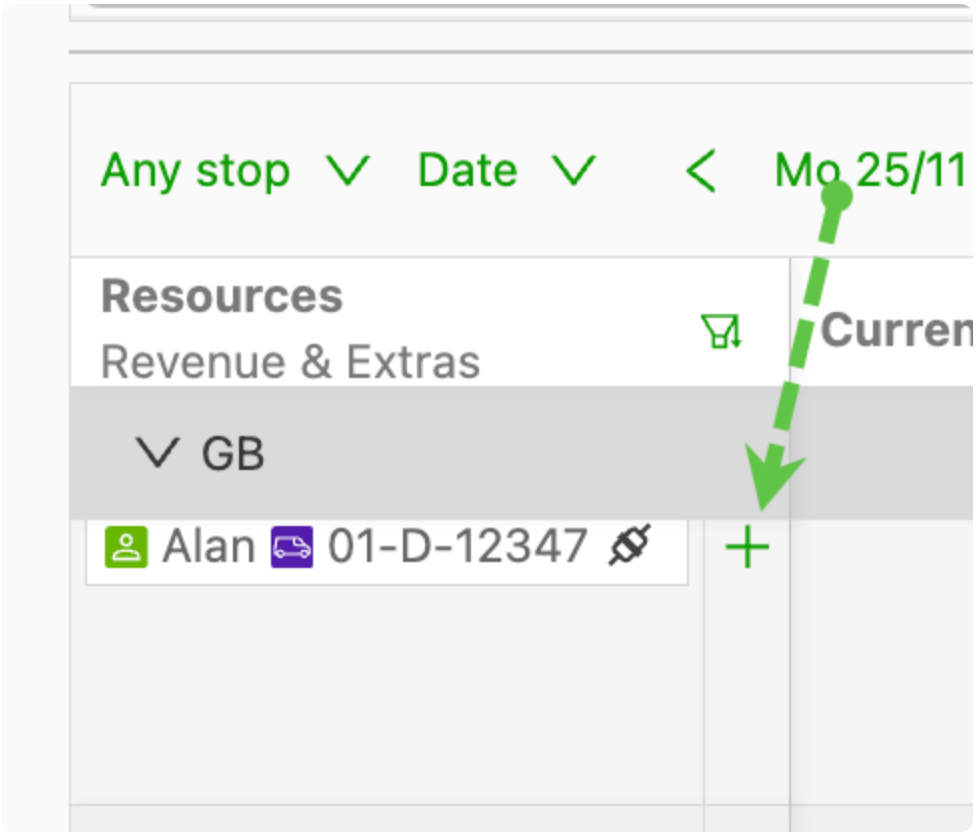


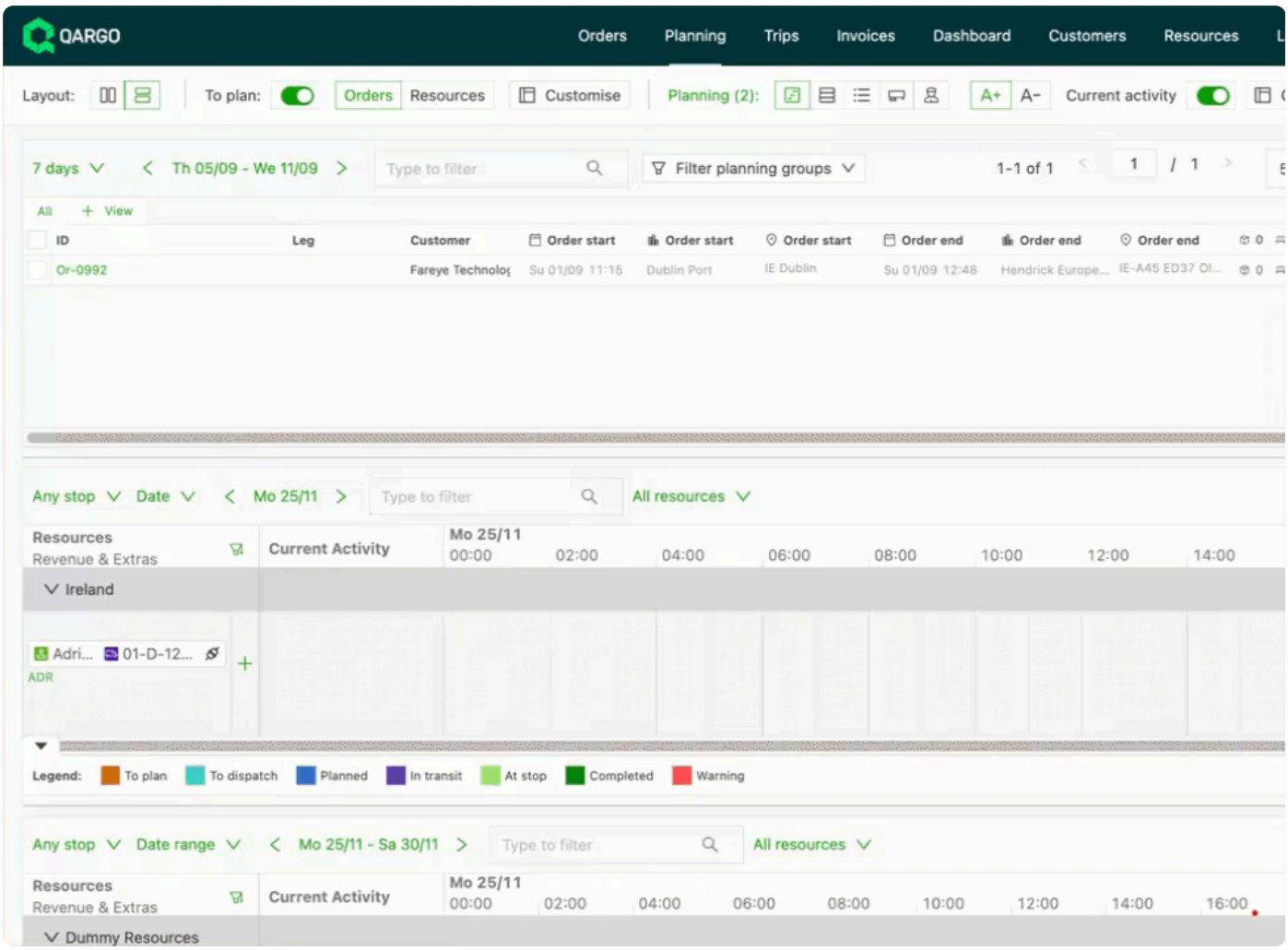
Add a note

In both the Timeline and Board views, it is possible to ‘Add a note’. Notes give visibility of critical information associated with a resource. The note visibility defaults to a 4 hr time limit, but this can be adjusted manually. There is also the option to select multiple dates on which to show the note.



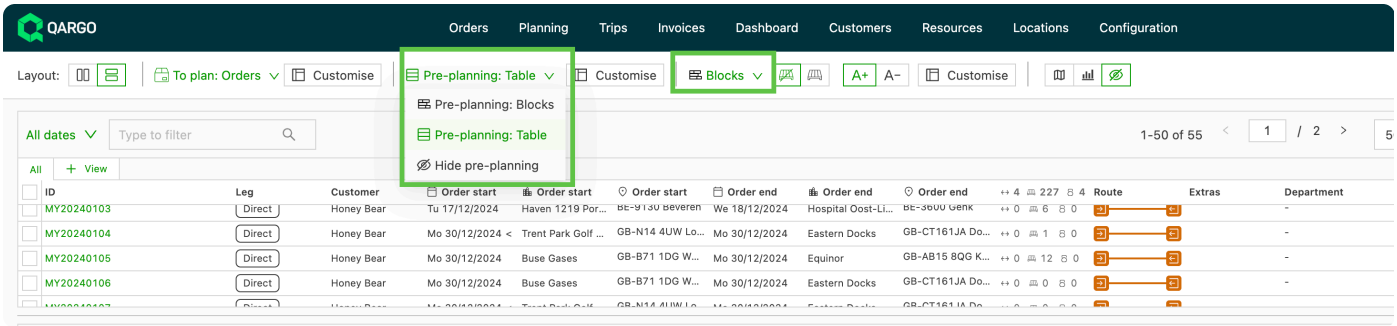
To create the note, click the ‘+’ next to the resource, or right-click anywhere in the row associated with the resource.


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



Pre-planning views.

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

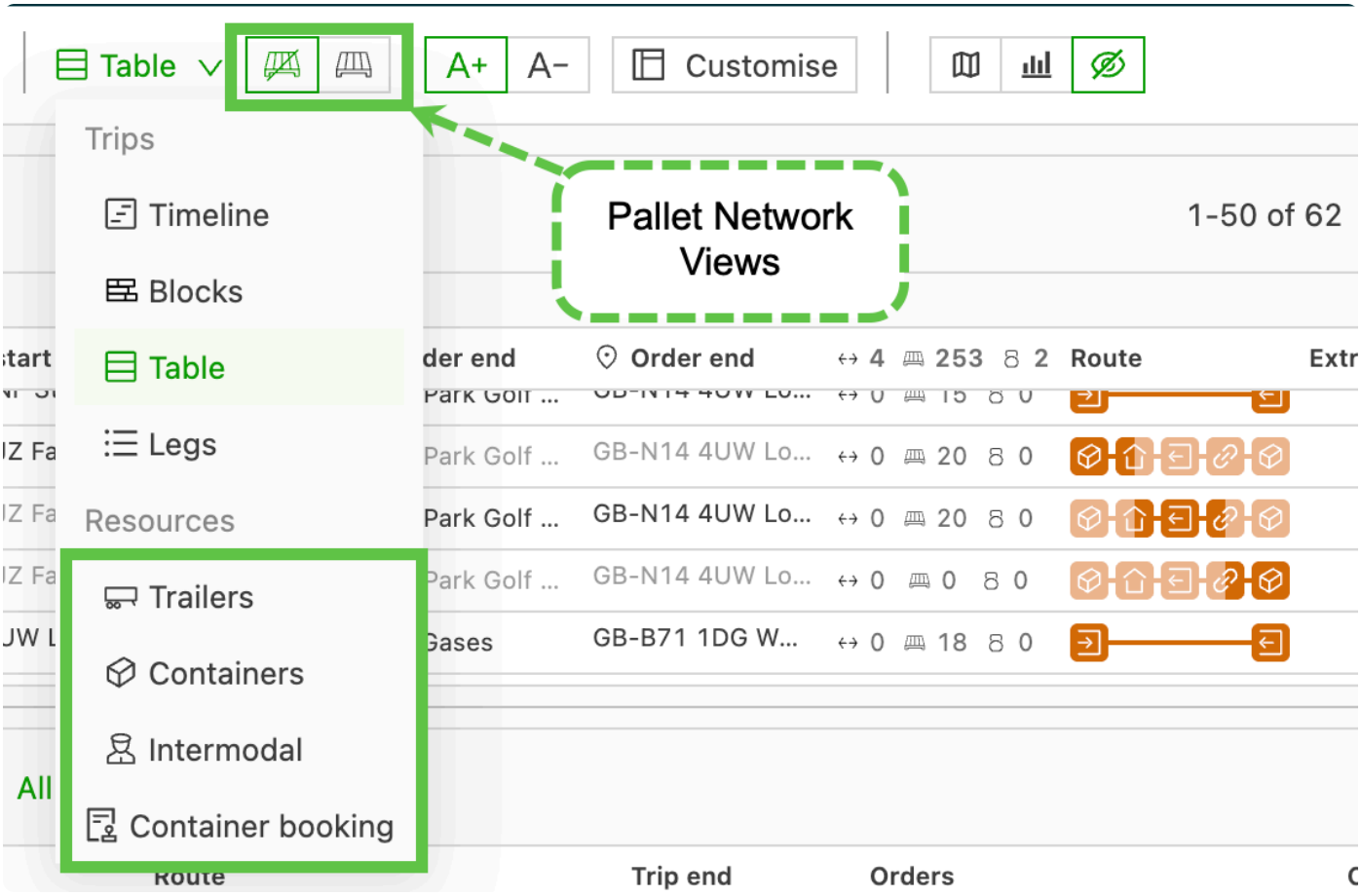


In these cases, the following views are available for pre-planning:

- The same view as the planning board view. For instance, if the planning view is Blocks, Blocks can also be chosen for pre-planning. If it is 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. Pre-planning views are not available if the main view selected is the List view.

Other available views are listed in the sections below:



- **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

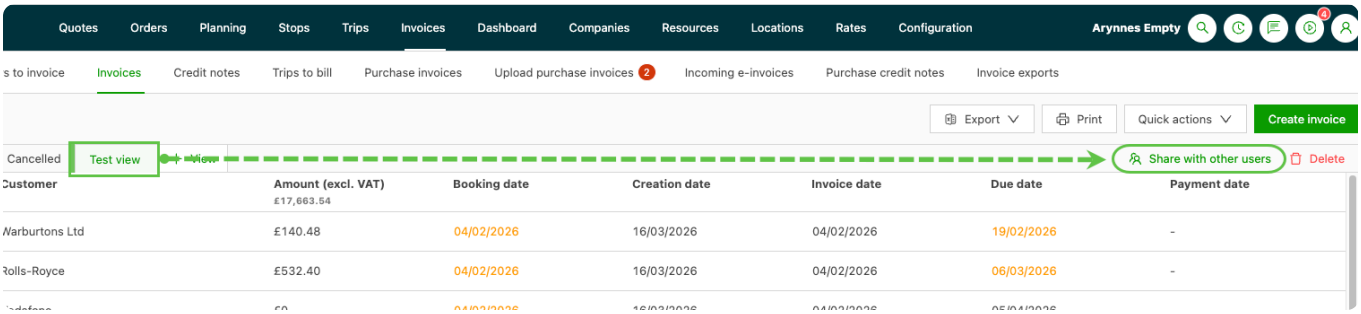
Shared views are configurations that all users of a team or organization can access. These views allow consistent data presentation and standard workflows. However, since they are shared, updates to these views affect all users. Only Super Admins can create, edit, and save changes to shared views. Users who originally created a shared view cannot save changes to it without 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 order 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.

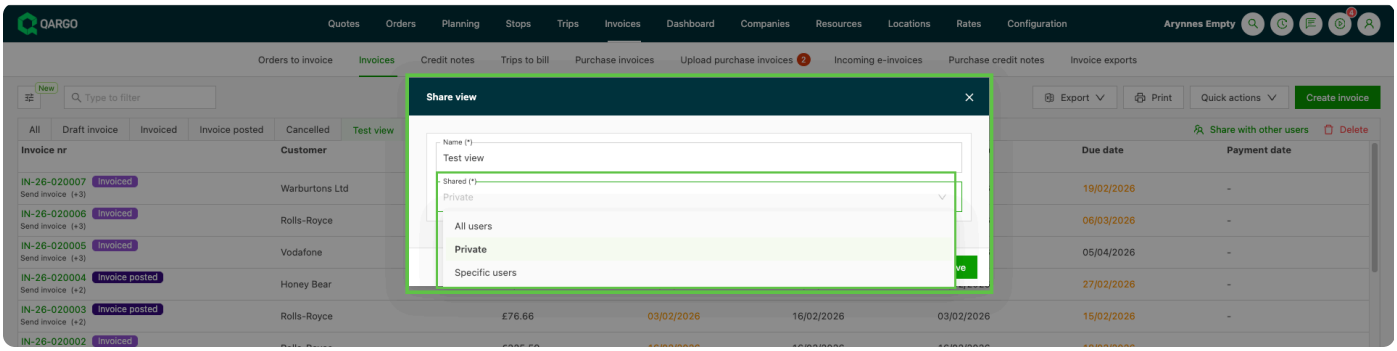
To **share** a custom view, options include sharing with ***all users or with selected users***

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

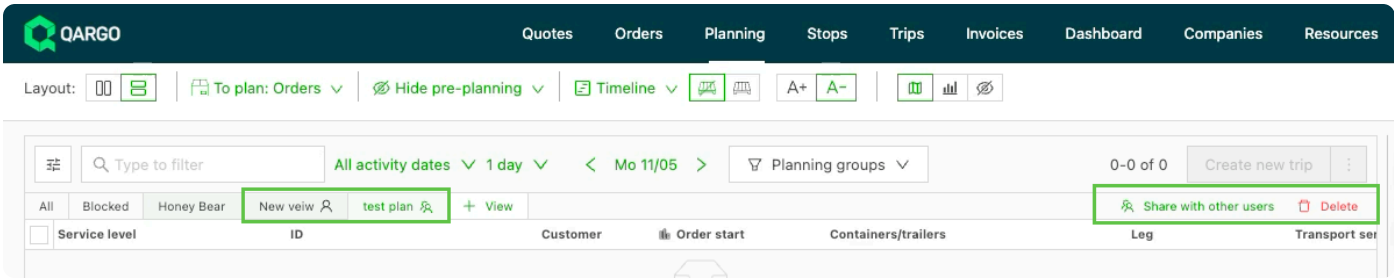


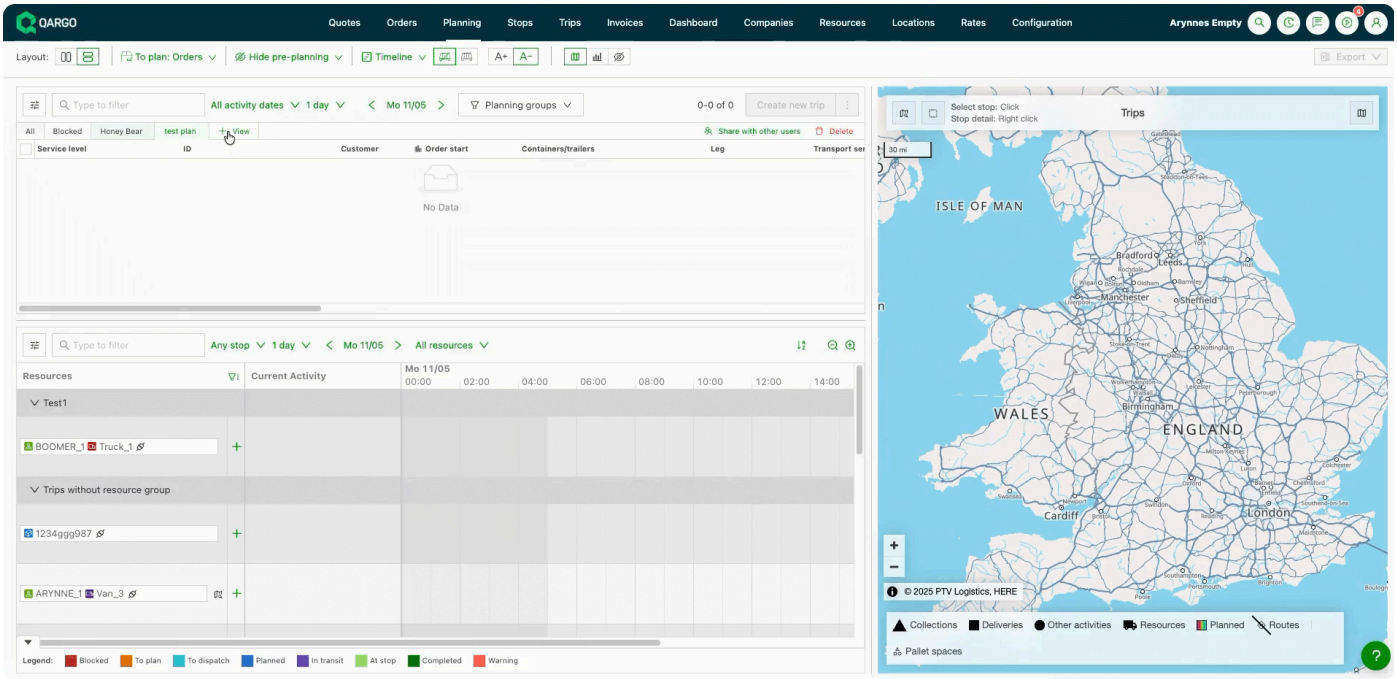
A pop-up screen opens, allowing the user to select the sharing option:

- All users: Shares the view with all users who have access to the page / view
- Private: Keeps the view private to the user who created it
- Specific users: Select users from the drop-down list to share the view with (marked with ✅)
  - Multiple users can be selected, but they must already exist in the platform



- The view is shared with users within the organization. An icon is added to indicate that 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*.