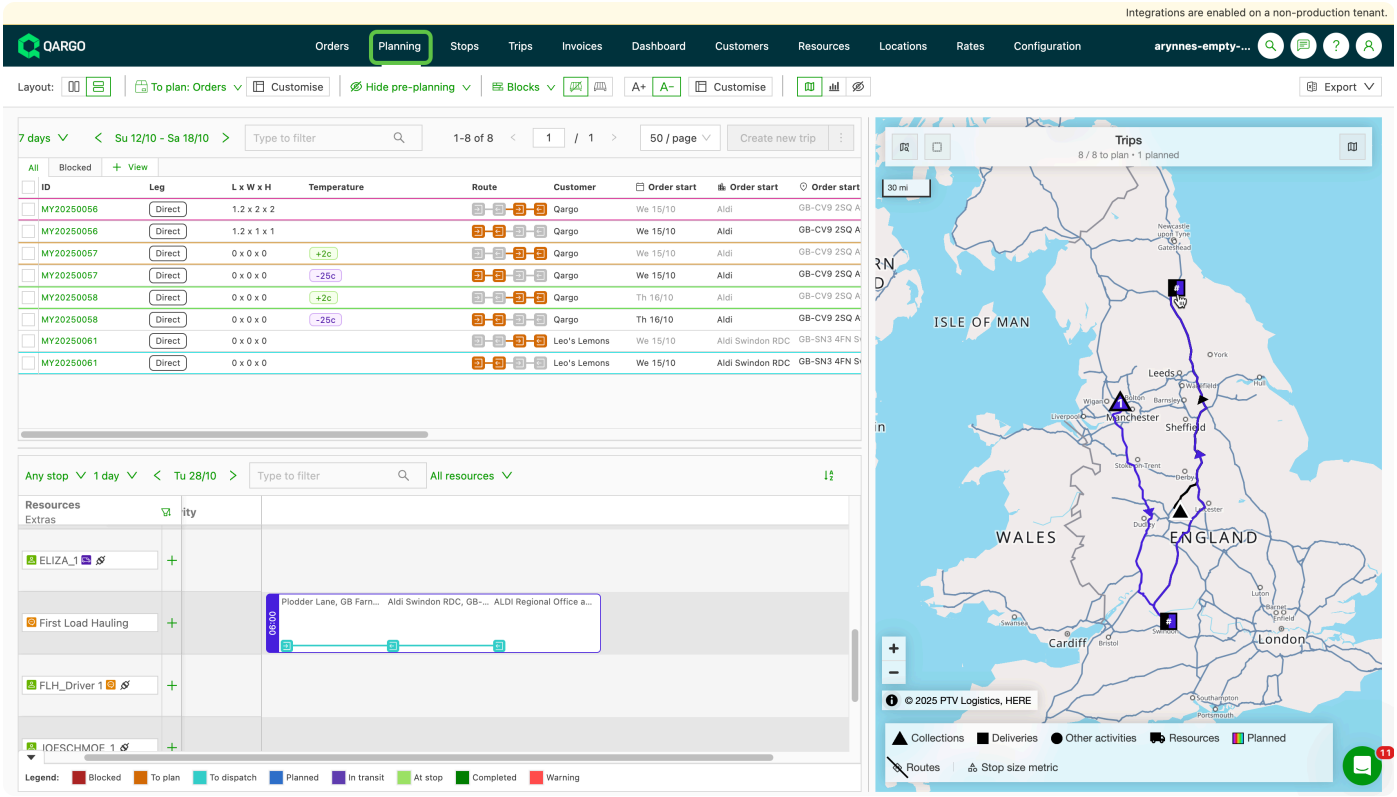
# Planning – Planning list view functions

Explanation of features and how to customize the Planning list page, including additional filtering tips.

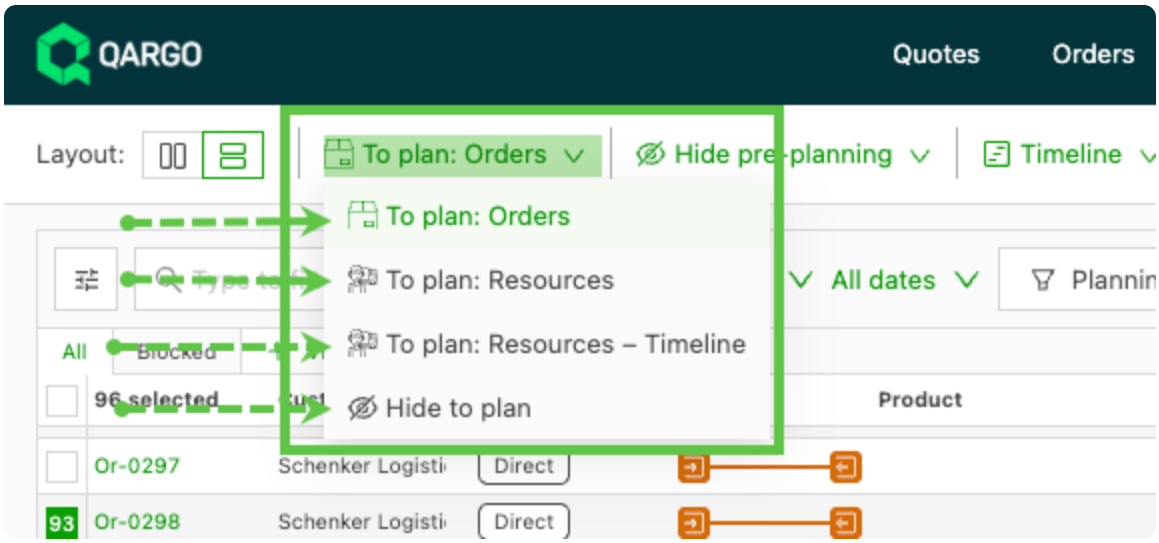
Updated May 20, 2026

To start planning orders, switch to the planning column as shown below (also see 👉**Plan load**):

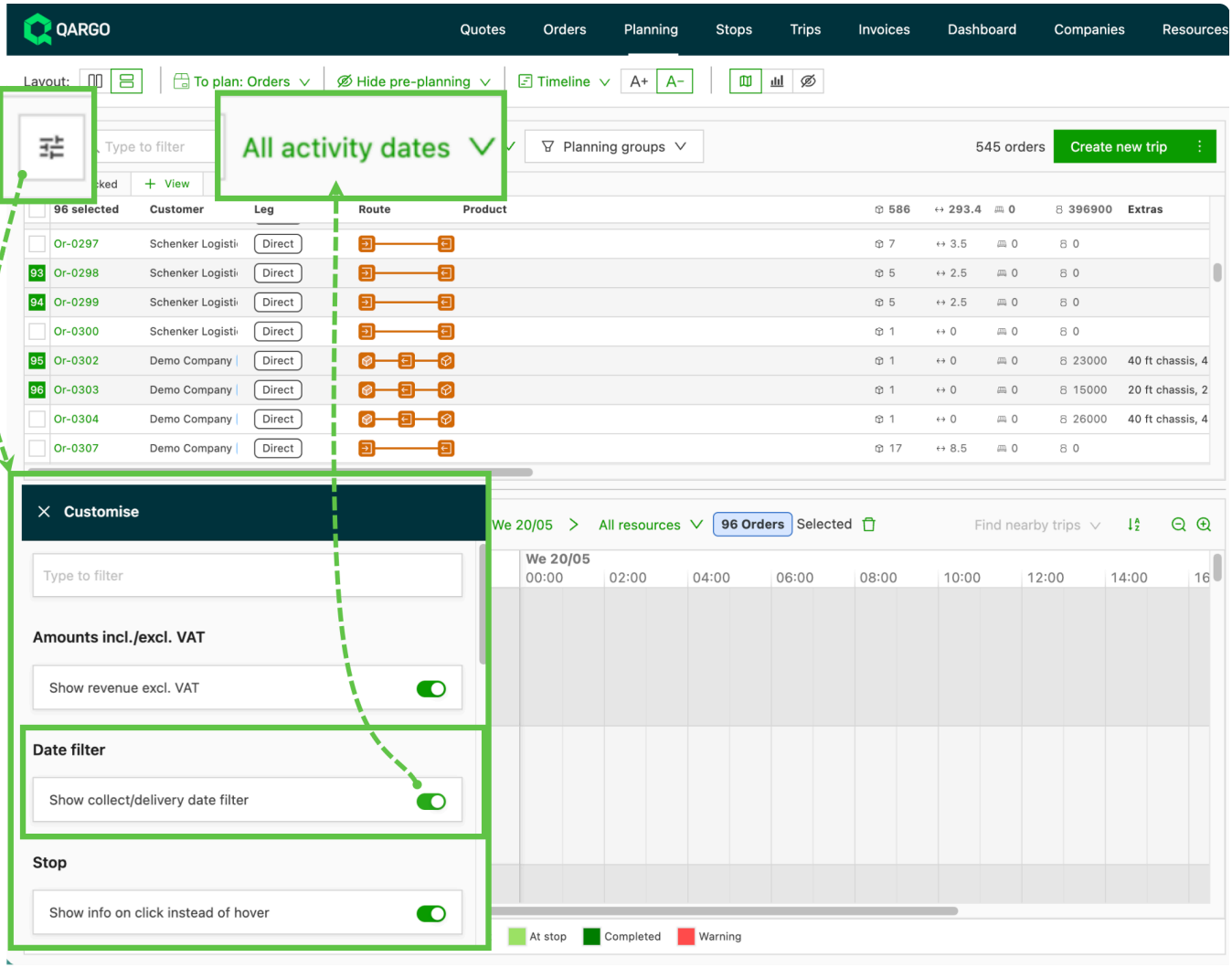



## Options for the list of orders to plan

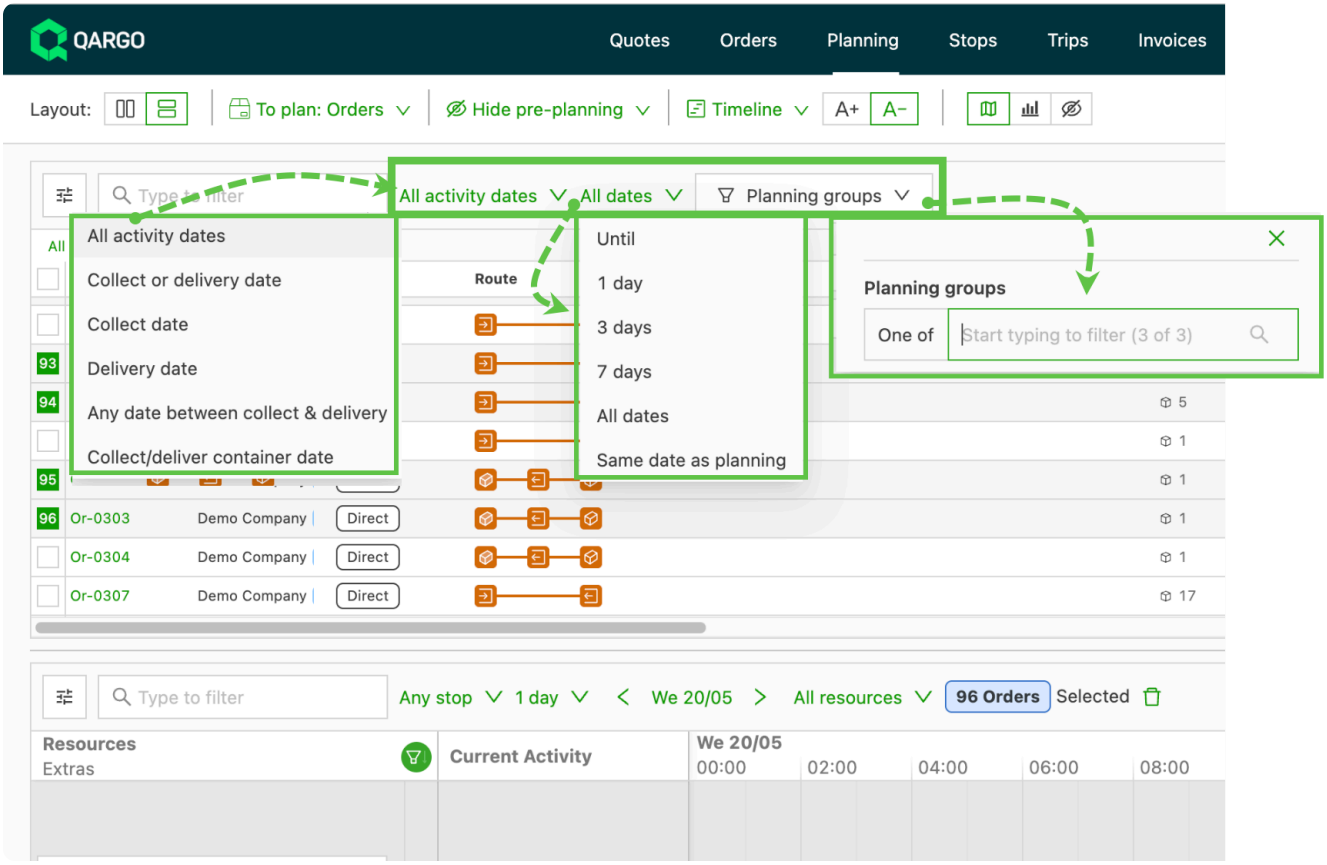
- To see the list of orders to be planned, select **'To plan: Orders'** from the dropdown:



- This view shows fields where the customize button enables other data columns and features in the view, including activity dates as filters:



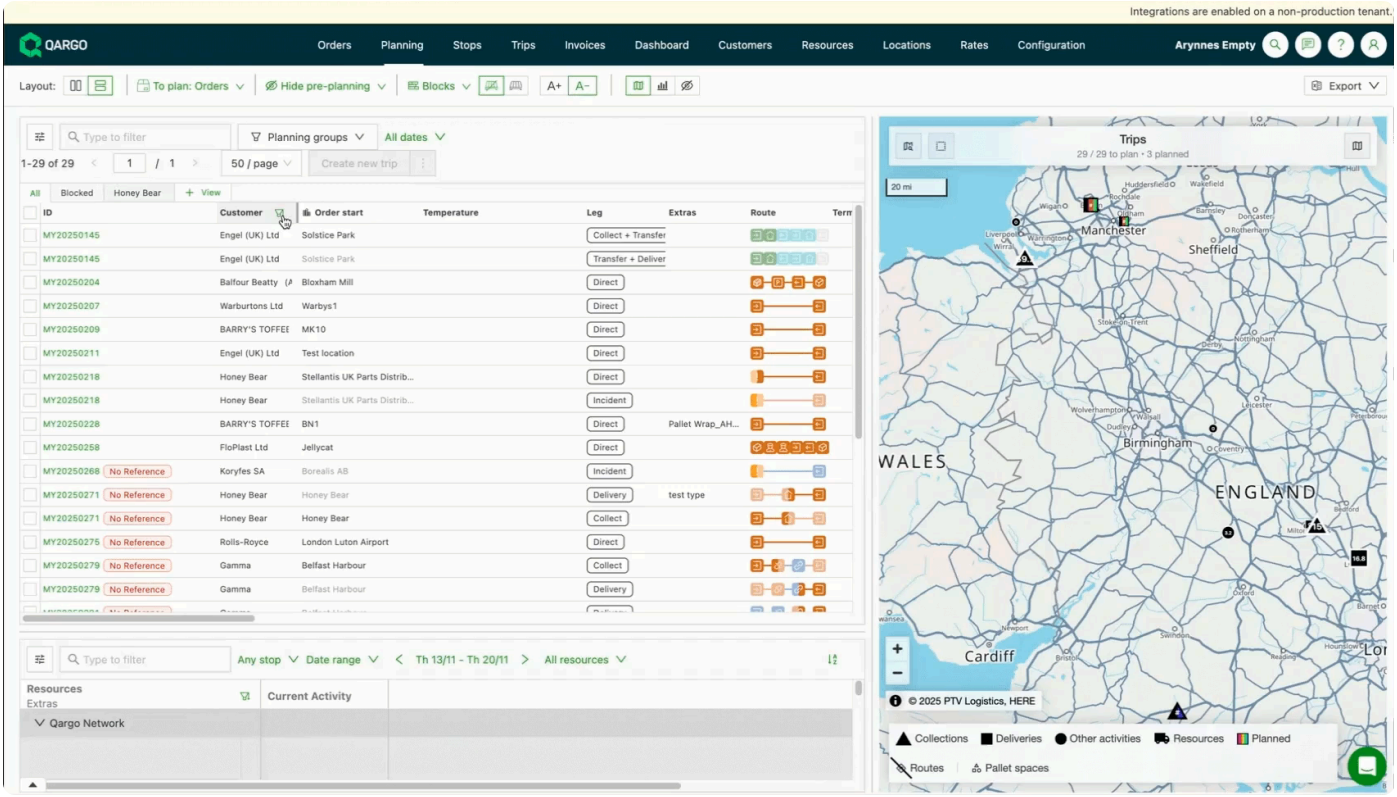

- Use the search bar, planning groups and date filters to view specific orders



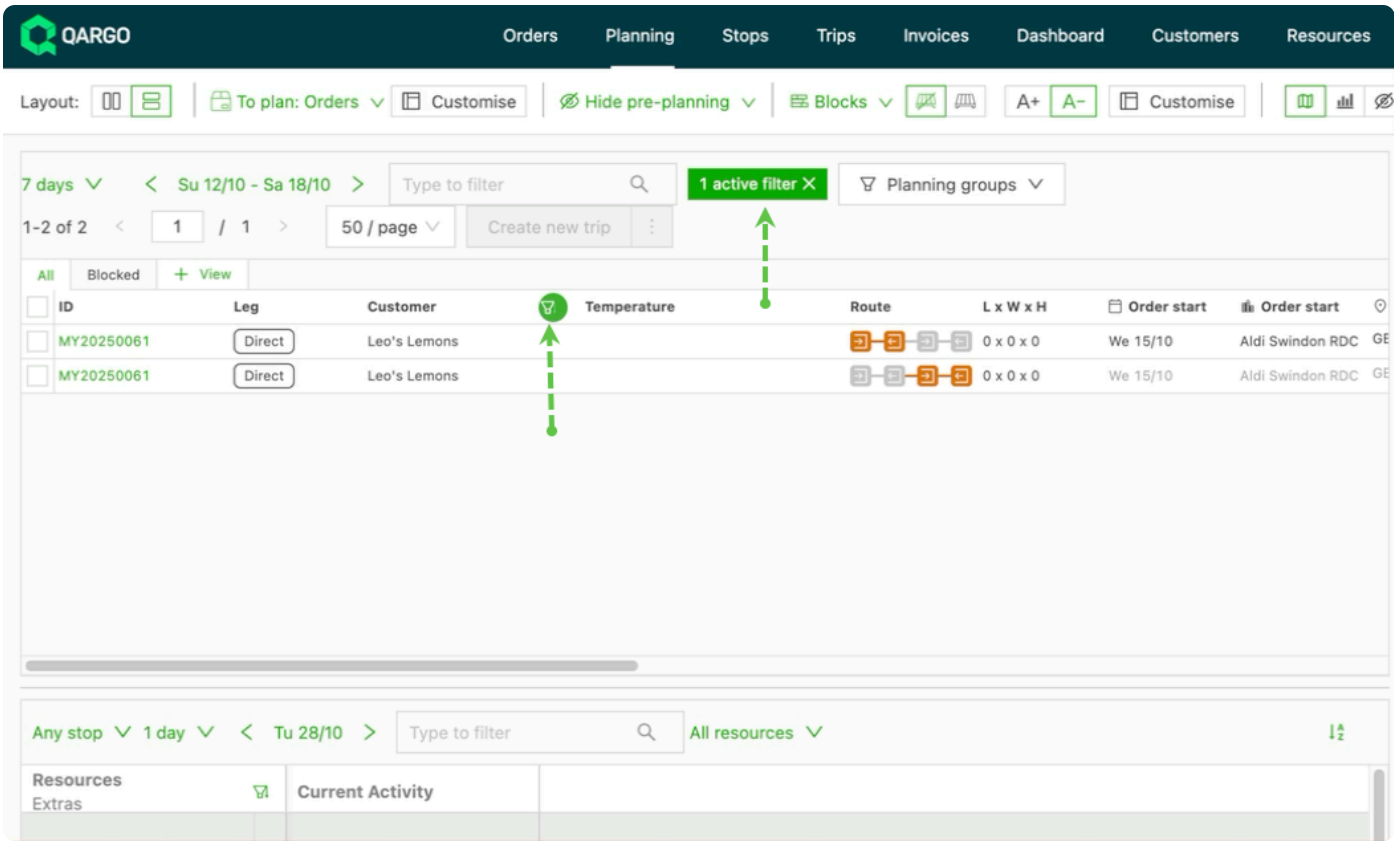

🧰 Planning groups only show if set up under **Rates > Order input > Planning/Resource groups**.

## Filtering

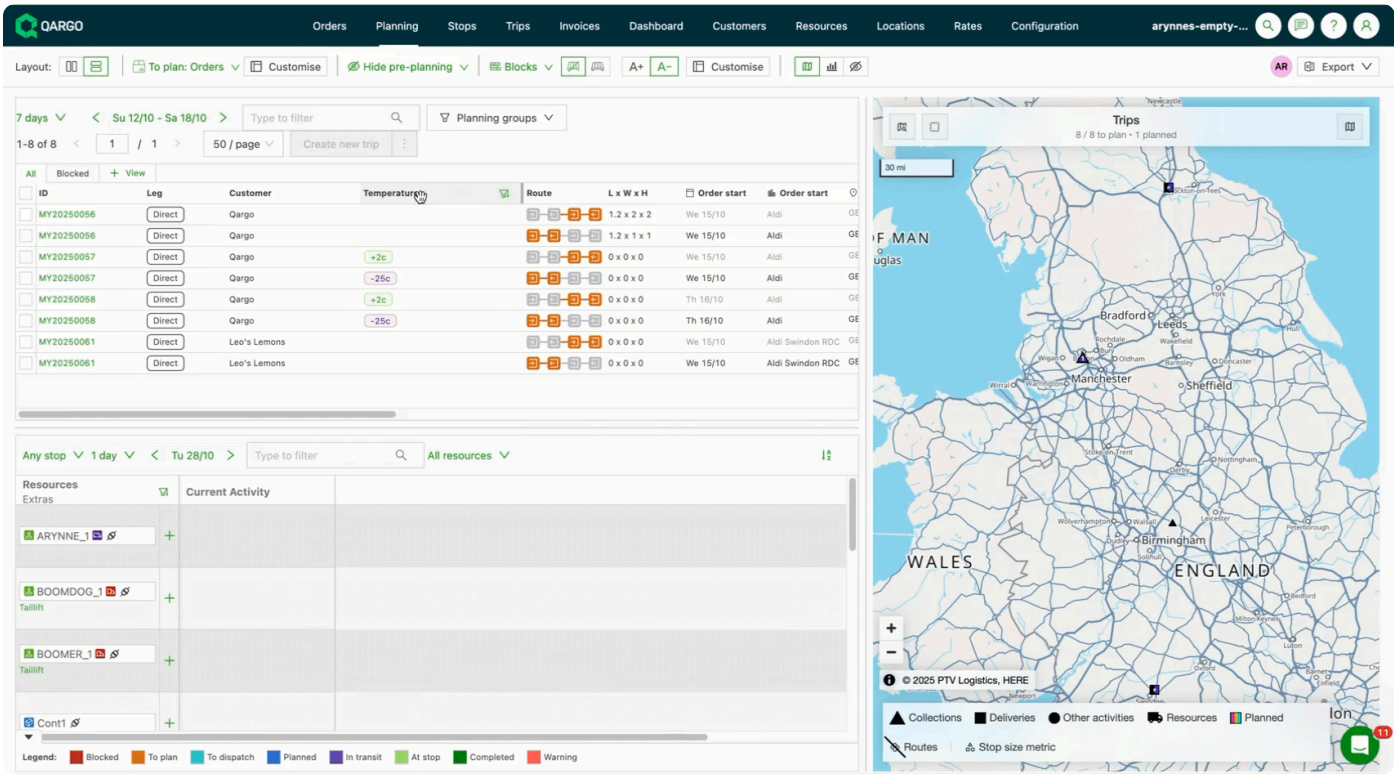
- Use the filter icon in the column headers of the list view.
- Click to display filter options per column



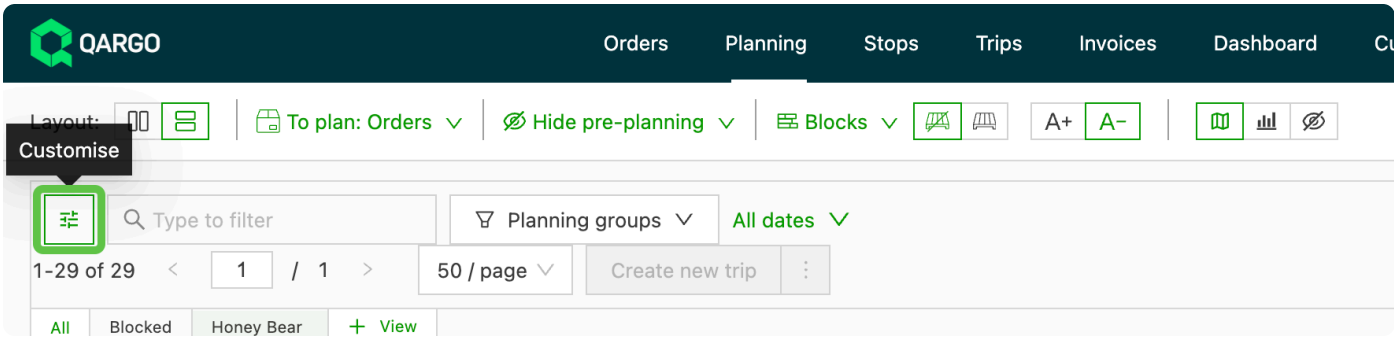

- Applied filters are highlighted

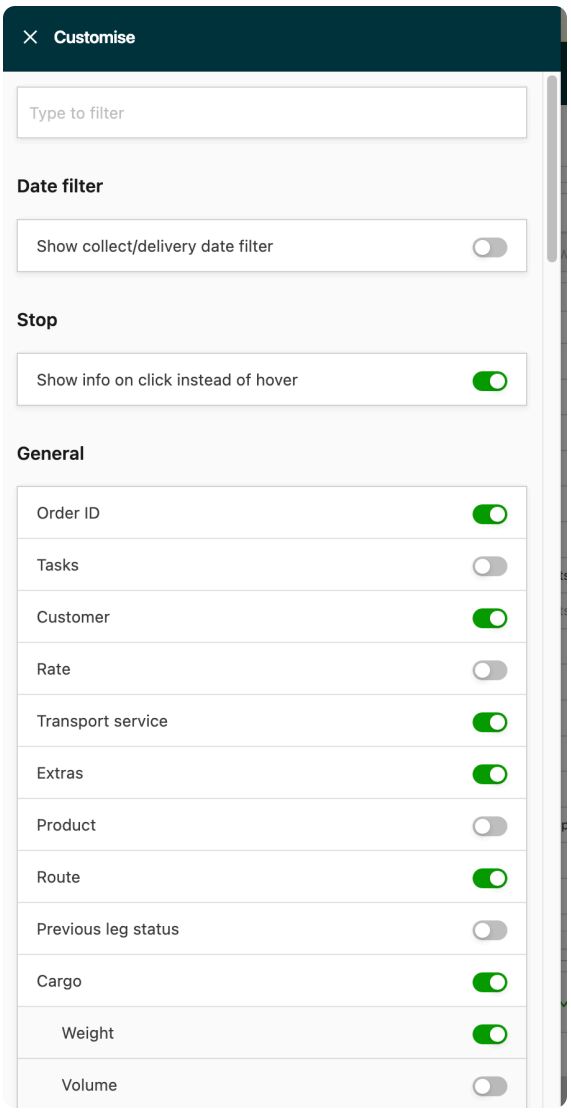



- Columns can be dragged into the preferred order, and their width can be adjusted:




- The customization option lists the options to include in or exclude from the view.






- Set the toggle **On** to show the specific information in the list view.
- Set the toggle **Off** to exclude the specific information from the list view.

**Planning customizations**

## To plan: Orders

The **To plan: Orders** list now uses infinite scroll. This removes the 100-order pagination cap, so planners can access all available orders without stepping through pages.

- **Scroll** down in the **To plan: Orders** panel; the next batch of orders loads automatically when the bottom of the list is reached.

## Use cases

- Planners handling high volumes of single-pallet jobs, parcel network shipments or groupage orders who need visibility of all available orders across a shift, without breaking their flow to navigate through paginated list pages.
- Planning teams assigning a large batch of orders to a single resource in one session, who previously could not see all relevant orders at once due to the 100-order cap.

- Operations where a planner needs to scan and prioritize orders across a full day's workload before starting assignment.

## How to use infinite scroll on the To plan: Orders list

### Viewing all orders to plan

1. **Navigate** to **Planning** in the main navigation menu.
2. The **To plan: Orders** panel on the left displays the first batch of available orders.
3. **Scroll** to the bottom of the list. A **Loading more rows…** indicator appears while the next batch loads automatically.
4. Continue scrolling until all available orders are visible. The *X / Y* counter in the top right updates with each batch loaded.

### Applying filters, sort or search

1. **Use** the filter, sort or search controls in the **To plan: Orders** panel.
2. The list resets to the top and starts loading from the first batch whenever filters, sort order or search terms change.

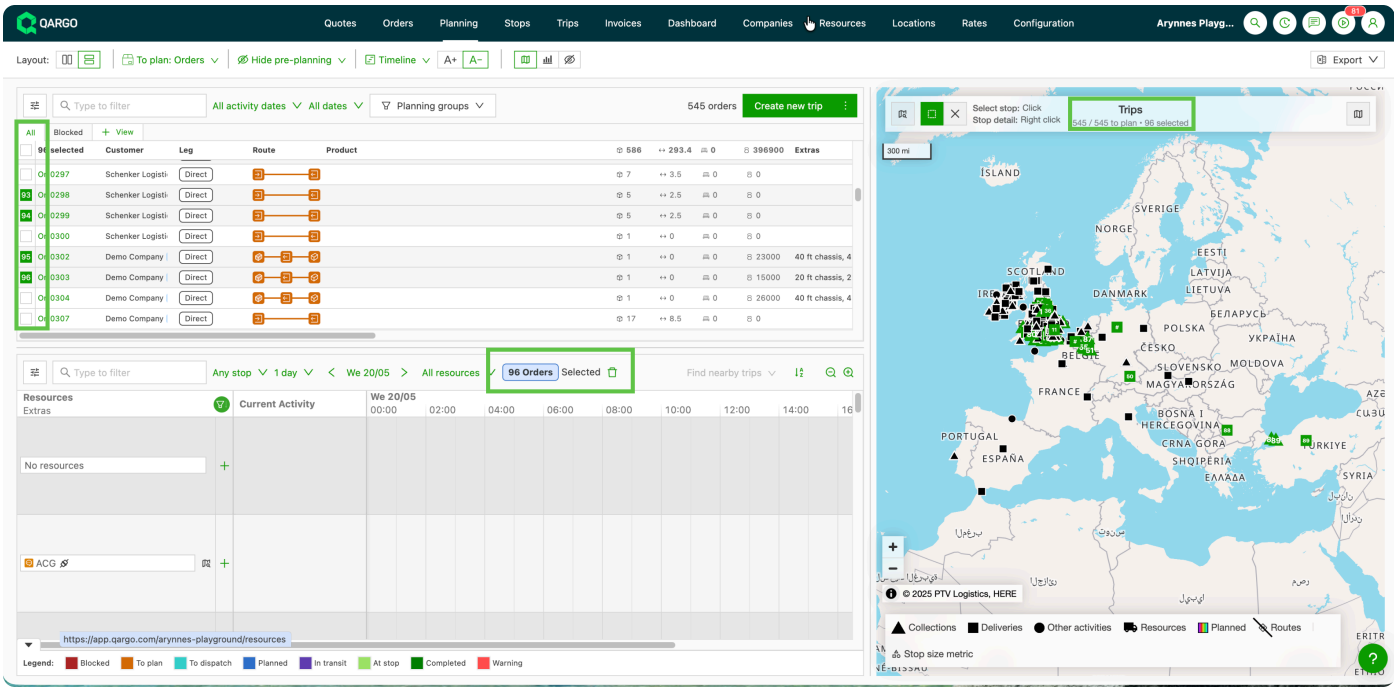
### Dragging and dropping orders onto the planning timeline

1. **Drag** any order from the **To plan: Orders** list onto a resource row in the planning timeline.
2. The order disappears from the **To plan: Orders** list once it is assigned to a load.
3. **Drag** an order back from the timeline to return it to the **To plan: Orders** list.

### Selecting and bulk-planning orders

1. **Use** the checkbox column to select individual orders, or **Select all** to select the first 100 loaded rows.
2. **Apply** a bulk action (for example, auto-assign or plan to load) to the selected set.

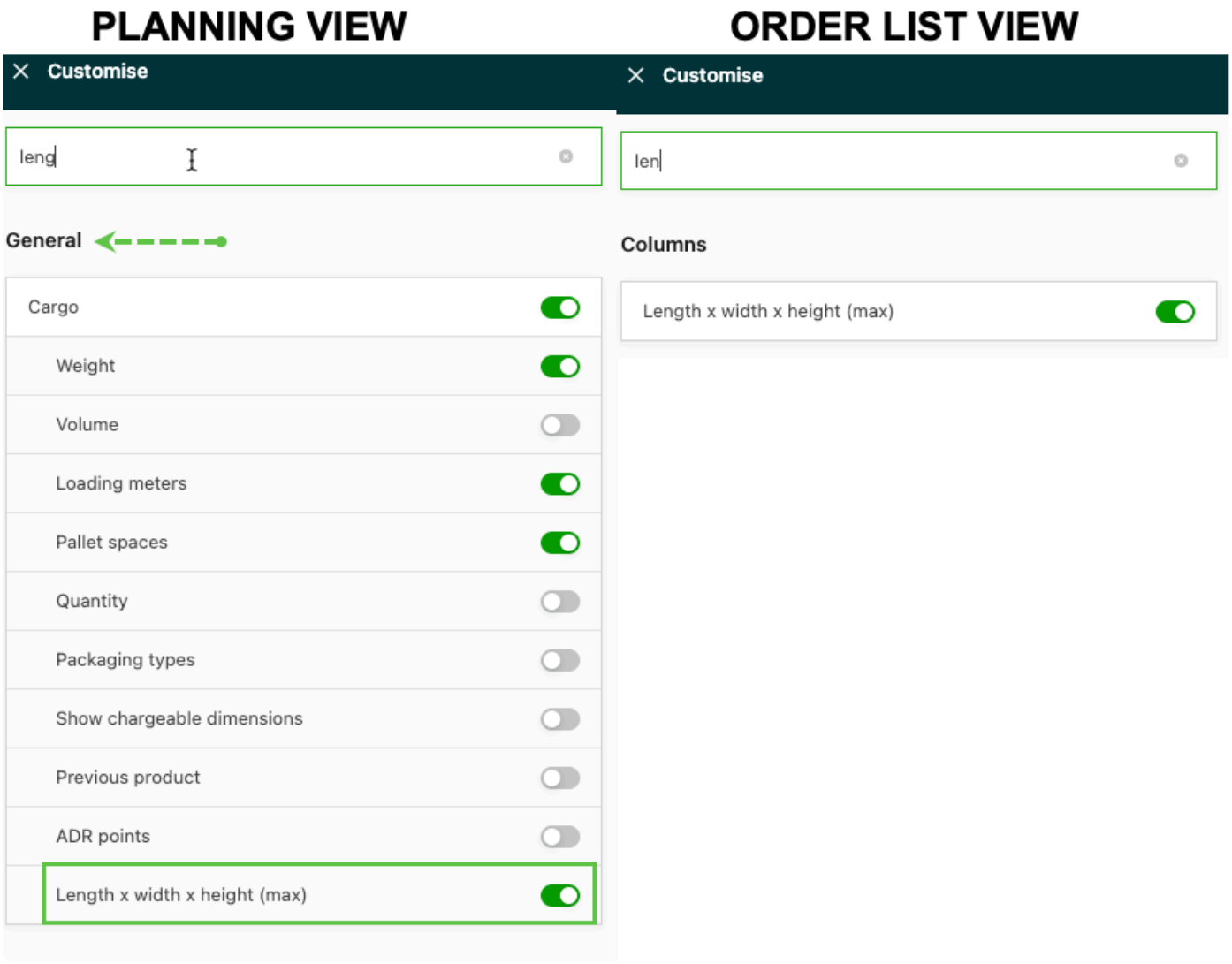
> 📚 Bulk actions are capped at 100 orders per operation, regardless of how many rows are loaded. See the Troubleshooting section below for guidance on planning larger sets.




### Show max dimensions

- Toggle on max dimensions to help with planning vehicle capacity

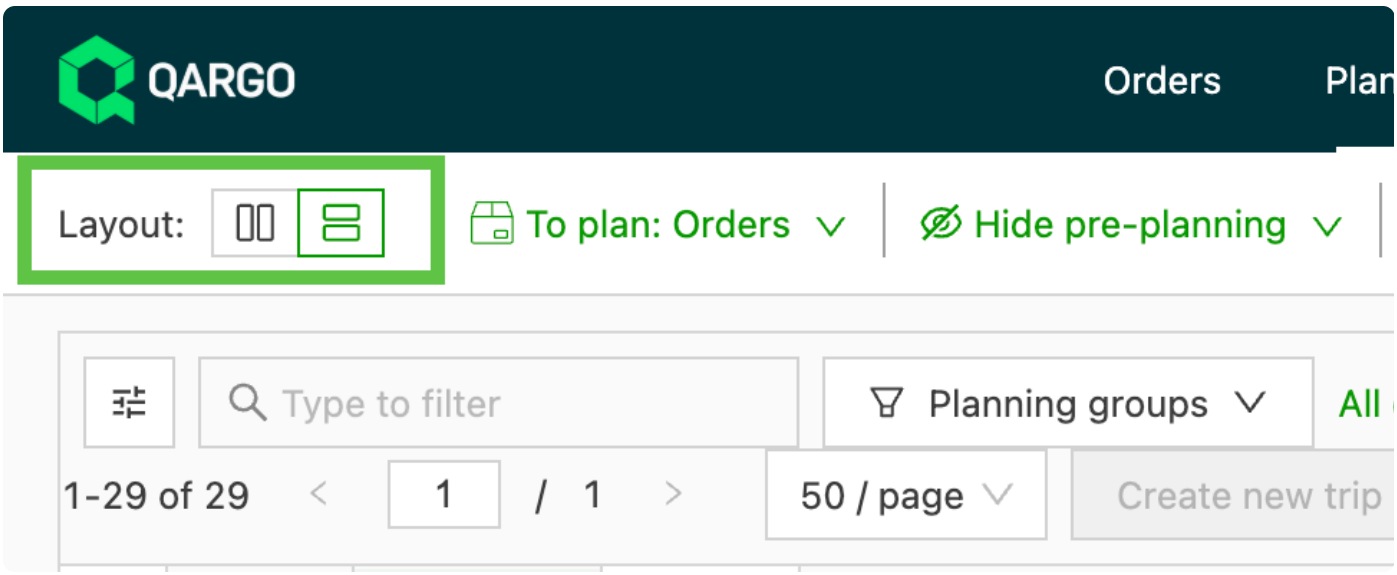
- Better oversight of piece sizes helps to assess vehicle capacity more efficiently



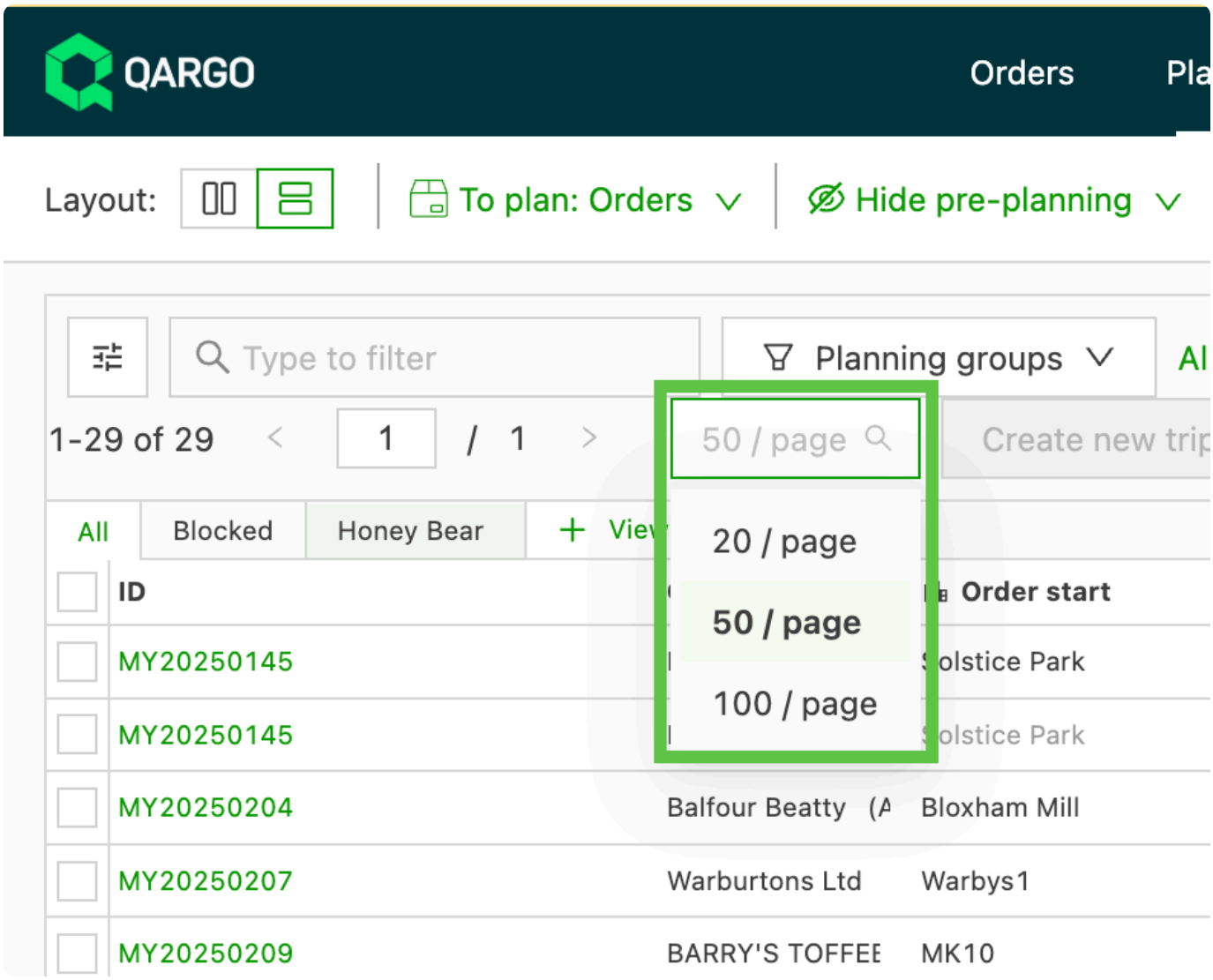

📚 Use the filter search at the top of the **'Customize'** features to find the option quickly.

### View layout

- 2 different layouts, based on preference
  - vertical
  - horizontal

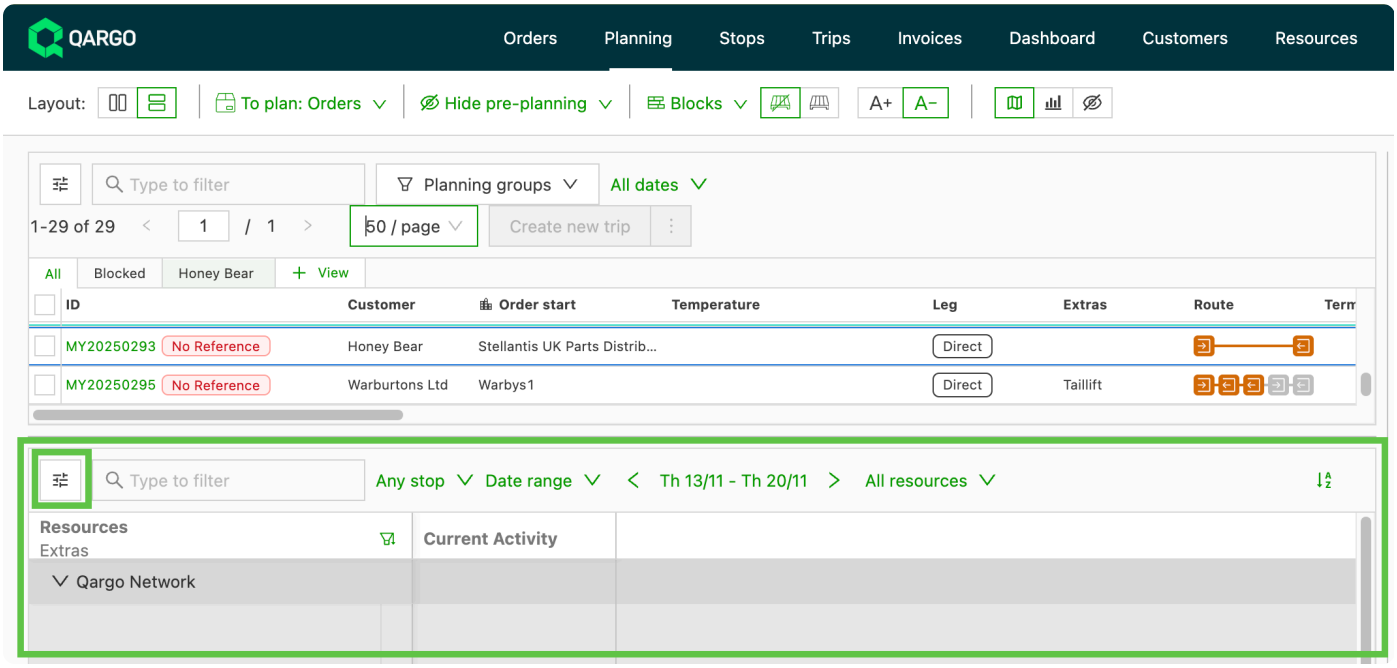



For a more comprehensive view of the list of orders, choose how many orders to plan are shown by selecting the amount per page option:

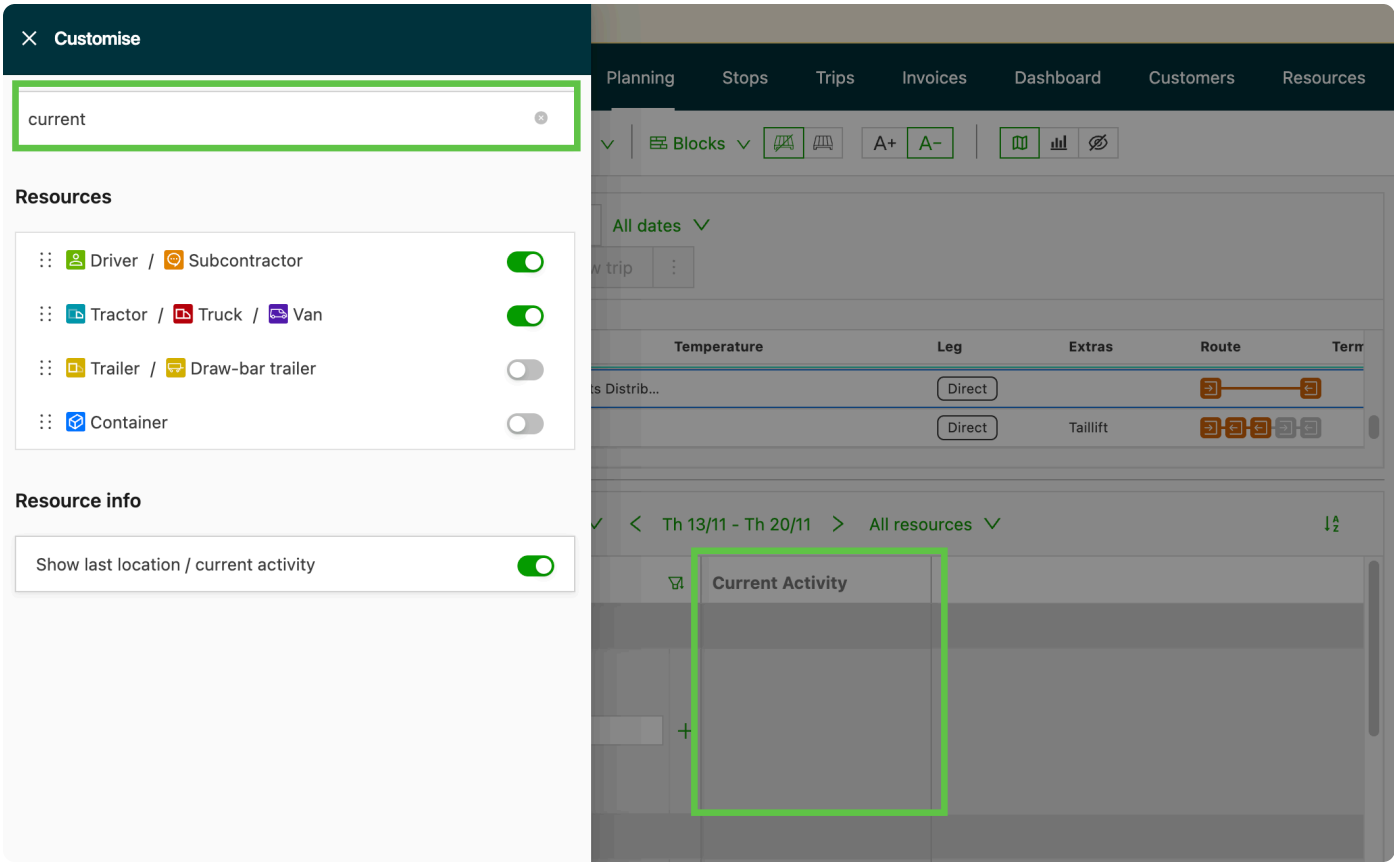


## Options for the list of loads on the planning board

- As with the **'To plan: Orders'** list, there is also a customization option for planned loads.

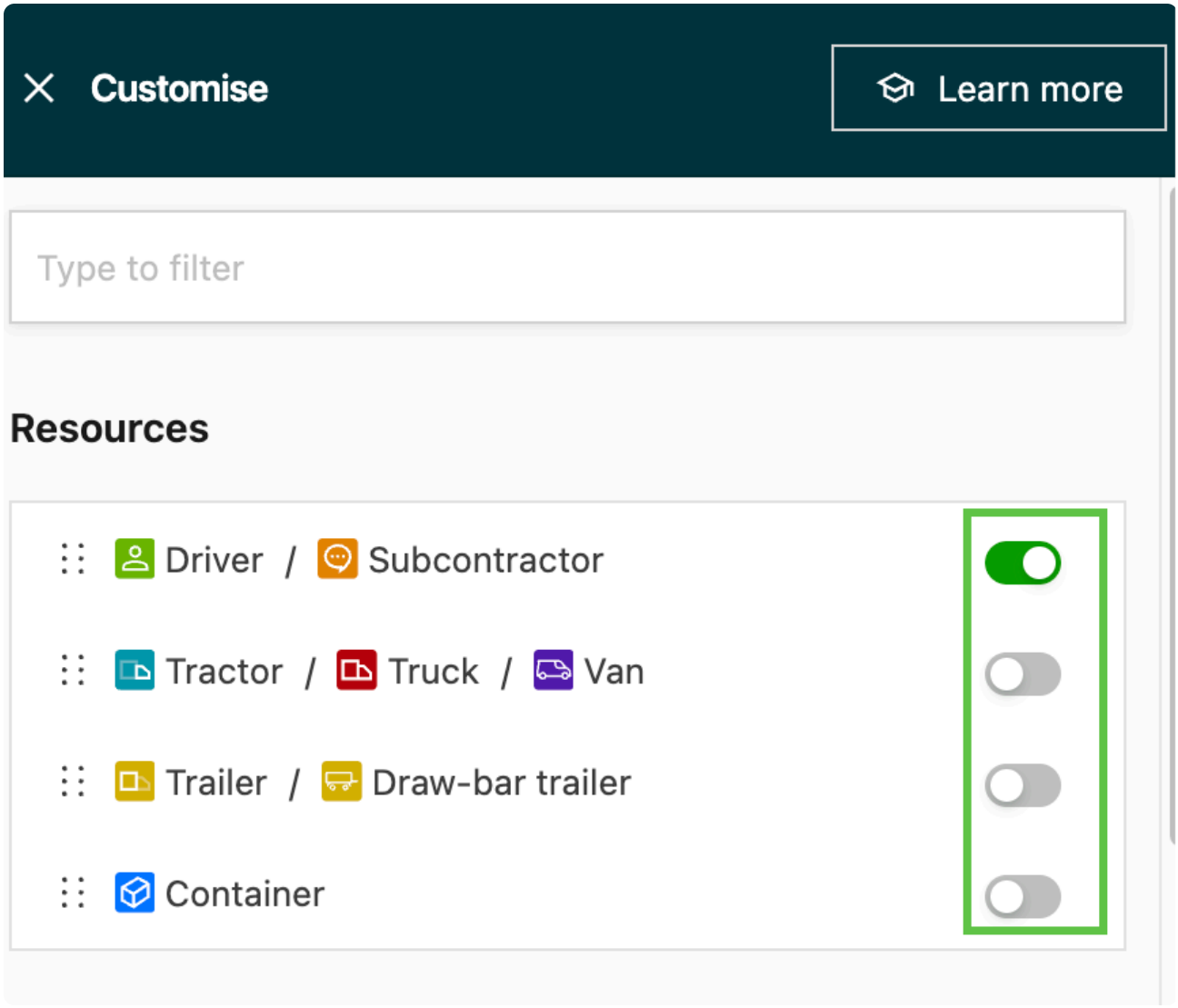



- List of options to toggle on/off to view on the planning board
- Use the search bar at the top to search for specific data to show

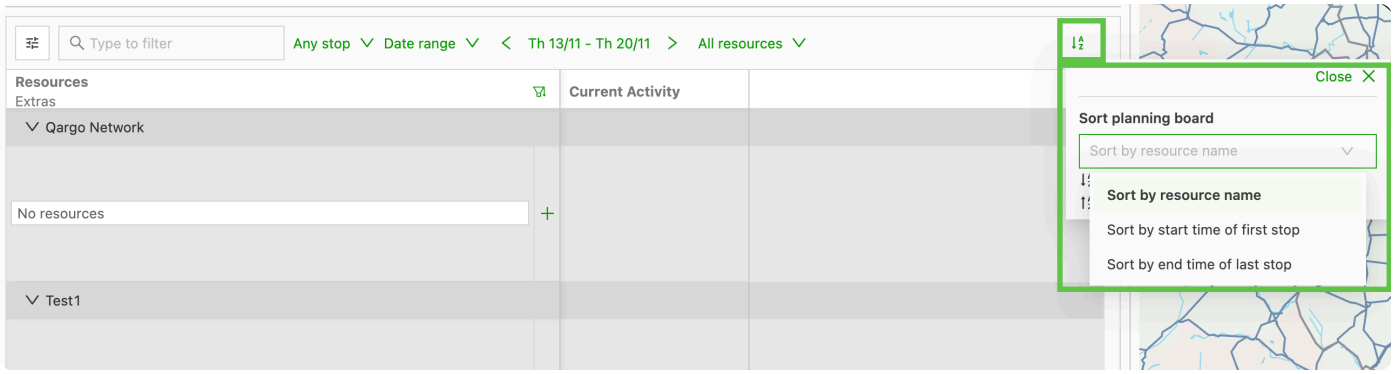


- For example, when **“Last location/current activity”** is activated, an additional column is added to the planning board to display this information.

📚 To change how resources are displayed in planning, click **Customize** and set the toggles, depending on the resource details to display.

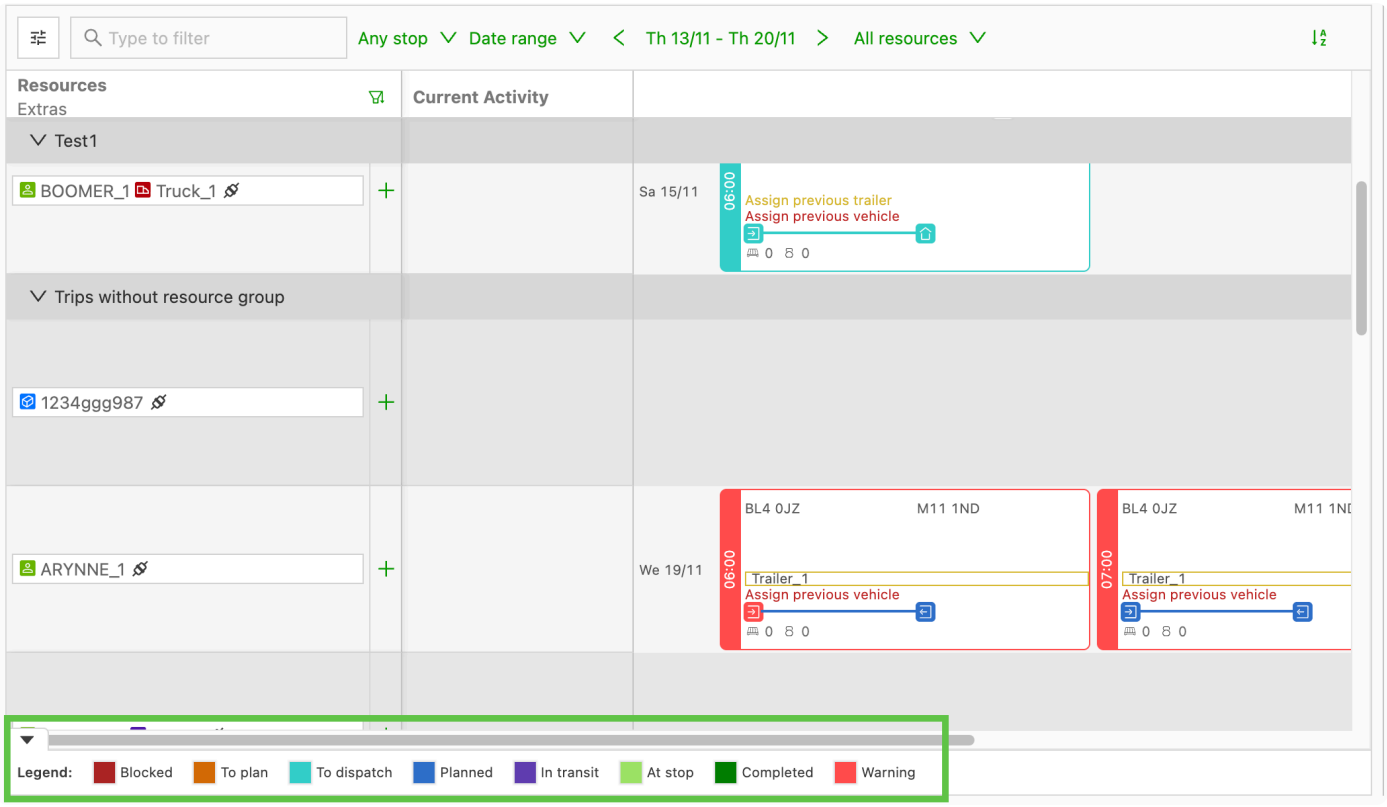



- The resource names are displayed according to the toggles that are set on
- Sort options are available:
  - Resource name
  - Start time of 1st stop
  - End time of last stop



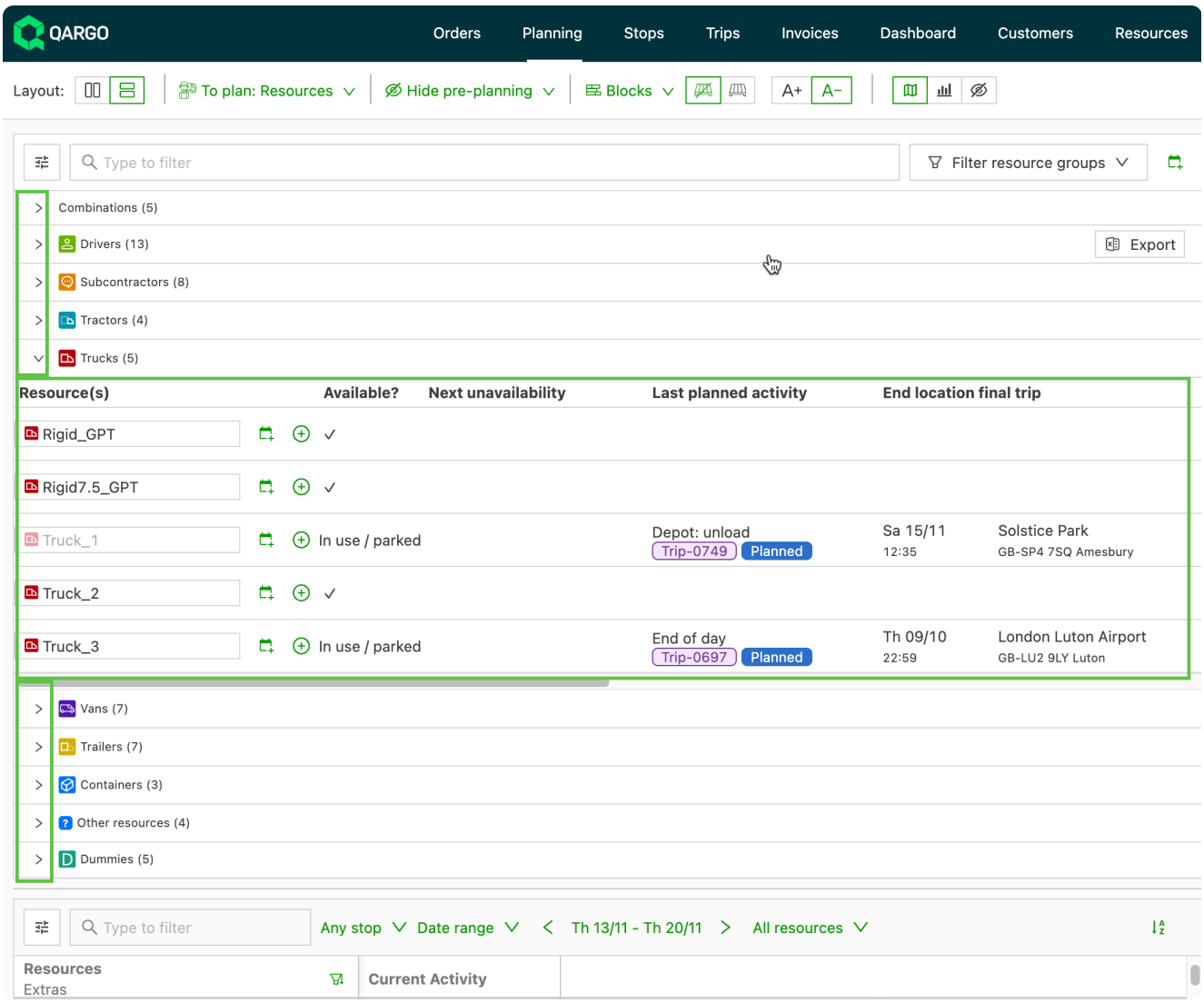

**Note:** Sorting loads by resource name is only available in the Planboard view. This option is not available in Loads.

- Color indicators also show the status of the stops/load

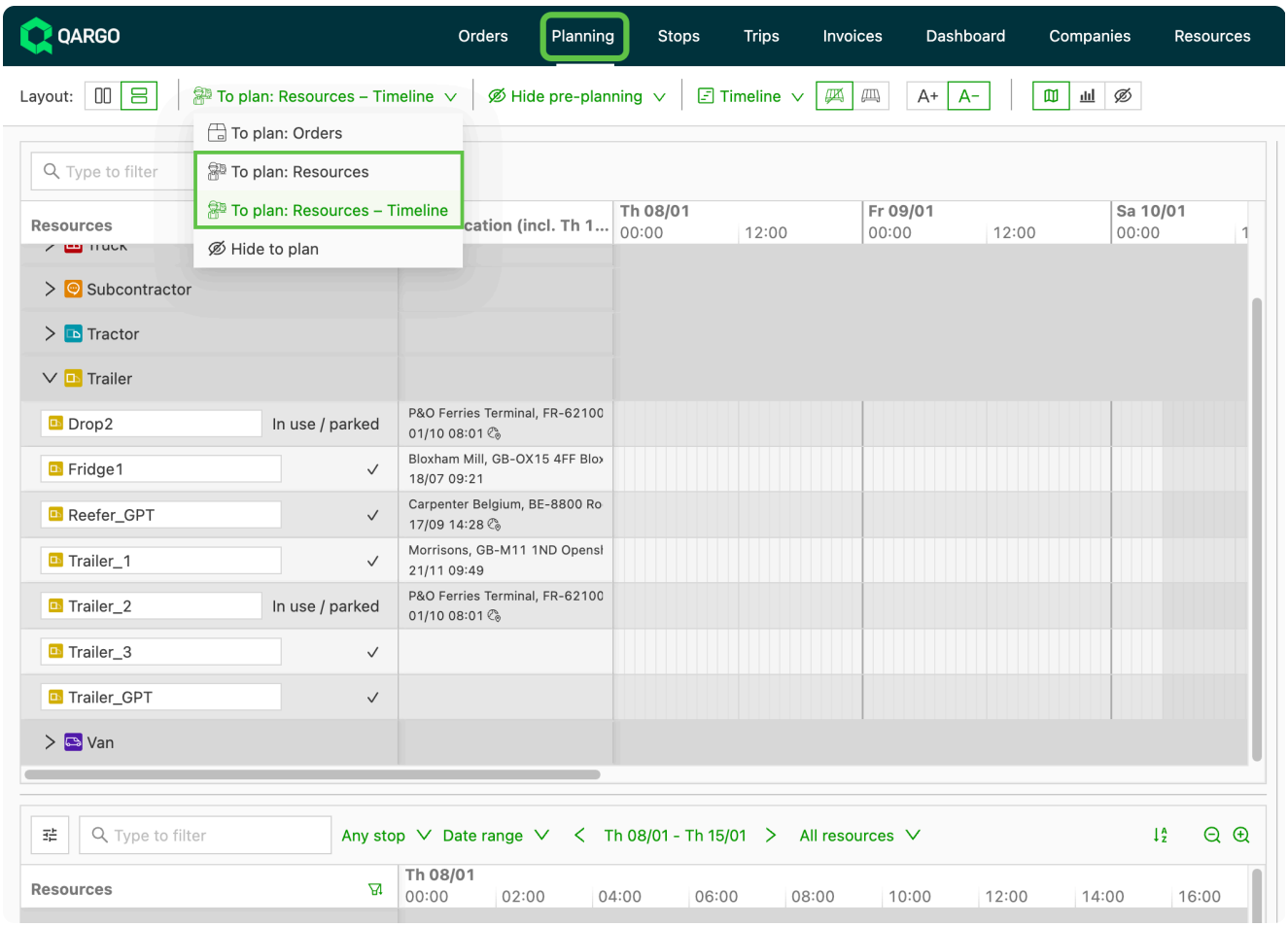



## Options for the list of resources to plan

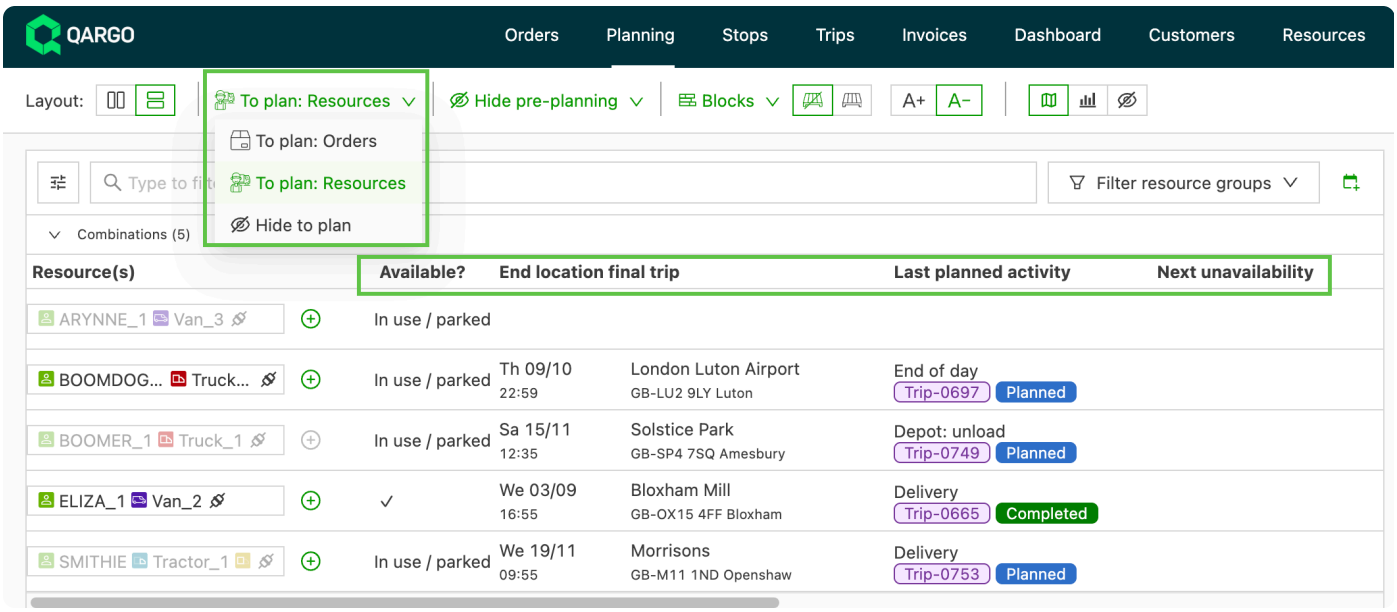
- Displays the list of resources; click > to expand the dropdown list. There are 2 options to select from for resources:
  - **To plan: Resource**



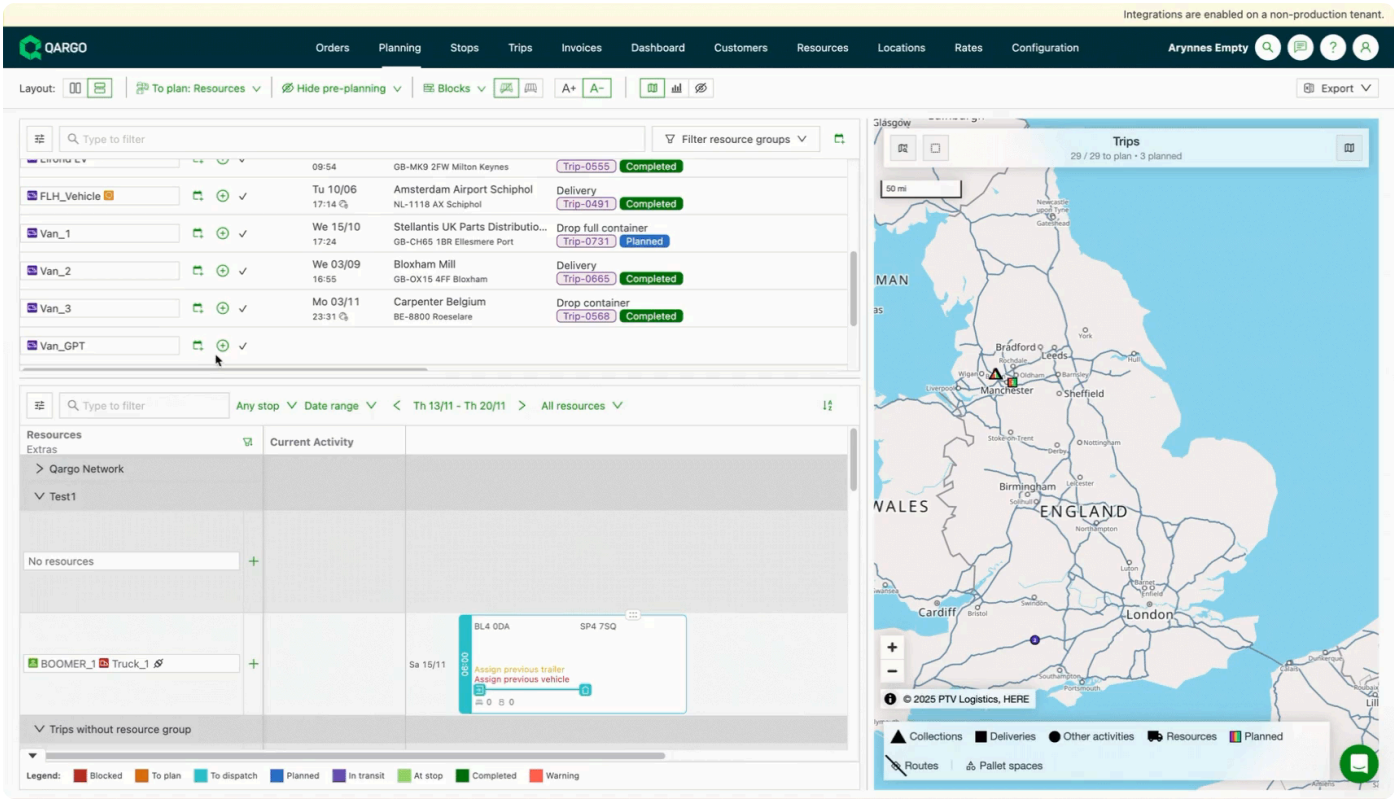

- **To plan: Resources – Timeline**




- Can be used to track the last activity/next unavailability of resources, or to add resources or combinations that do not have the 👉**Always on planboard toggle** to the planning
- Display shows:
  - Location of the last load
  - Activity and the load number and, if applicable,
  - Date of the next unavailability of that resource (click 👉**here** to learn about setting availability)



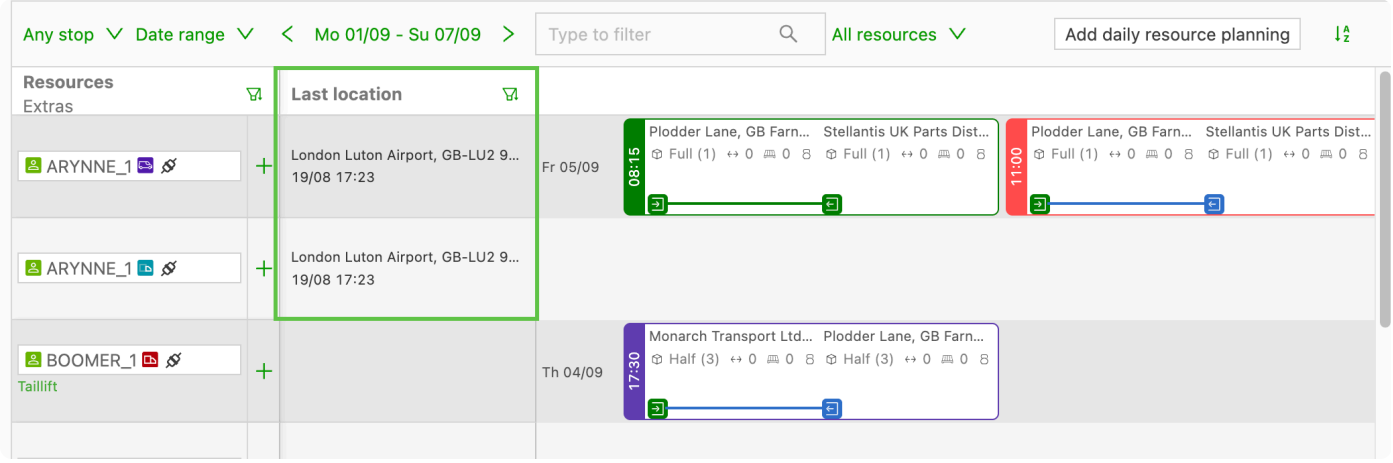

- To allocate resources that do not have the 👉**Always on planboard toggle** or that are not yet in the planning, click the **Plus (+) icon** next to the name of that resource




\

**Show last location toggle** {#h_094d8b8683}

- Shows the last location where the resource/combination executed an activity.
- Set on to see the last location of that specific resource in the planning.
- Information includes the name, address, date and hour of the last location
- Click the last location details to open the previous load details




## Summary

**What does this do?**

- Detail views throughout Qargo (orders, loads, load groups, order groups, invoices, carrier invoices, credit memos and carrier credit memos) can be opened in a preview slider instead of a full-screen overlay, keeping the rest of the screen visible

**Why does this exist?**

- Opening a full detail modal forced planners and operations staff to lose context every time they needed to inspect a record. For operations managing dozens of loads or orders at once, this constant context switching created significant friction. It was one of the most-requested improvements across customers

**How does it work?**

- Clicking a record opens the preview slider alongside the current screen. It is available for orders, loads, load groups, order groups, invoices, carrier invoices, credit memos and carrier credit memos
- The preview slider can be positioned left, center, right or at the bottom of the screen
- Clicking **Open as page** in the preview slider header opens the full record on its own page

## Opening the preview slider

The preview slider is available for the following record types: orders, loads, load groups, order groups, invoices, carrier invoices, credit memos and carrier credit memos. The preview slider shows the record's content alongside the current screen, so nothing underneath is replaced.

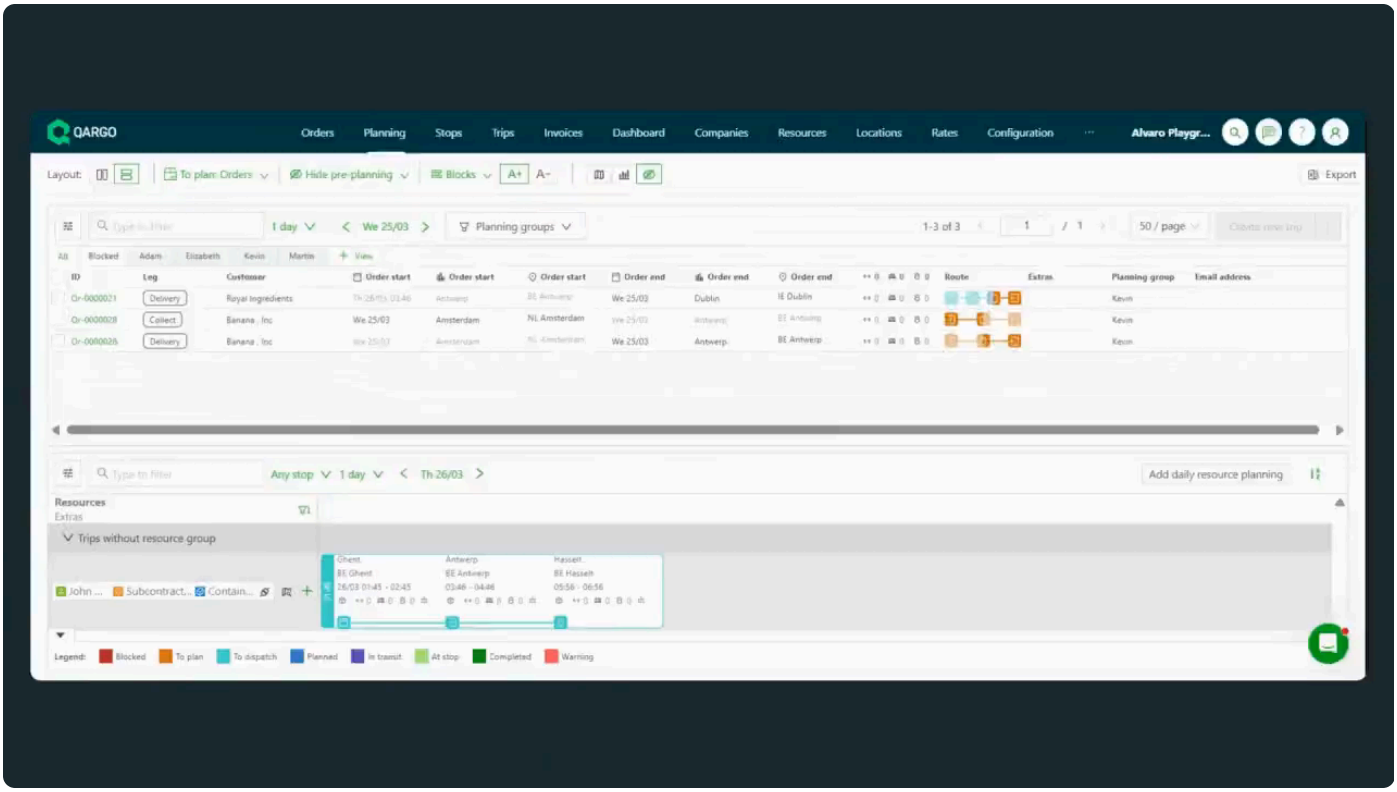
- **Click** the status of a record to open it in the preview slider. The content shown depends on the record type: load details show stops and route information, while order and invoice details show their respective layouts.
- **Close** the preview slider by clicking the **×** button in the header, or by clicking the same record again.

## Choosing the position

**Click** the **Position** button in the preview slider header to open the arrangement options. Select one of the four positions:

- **Left**: the preview slider docks to the left side of the screen

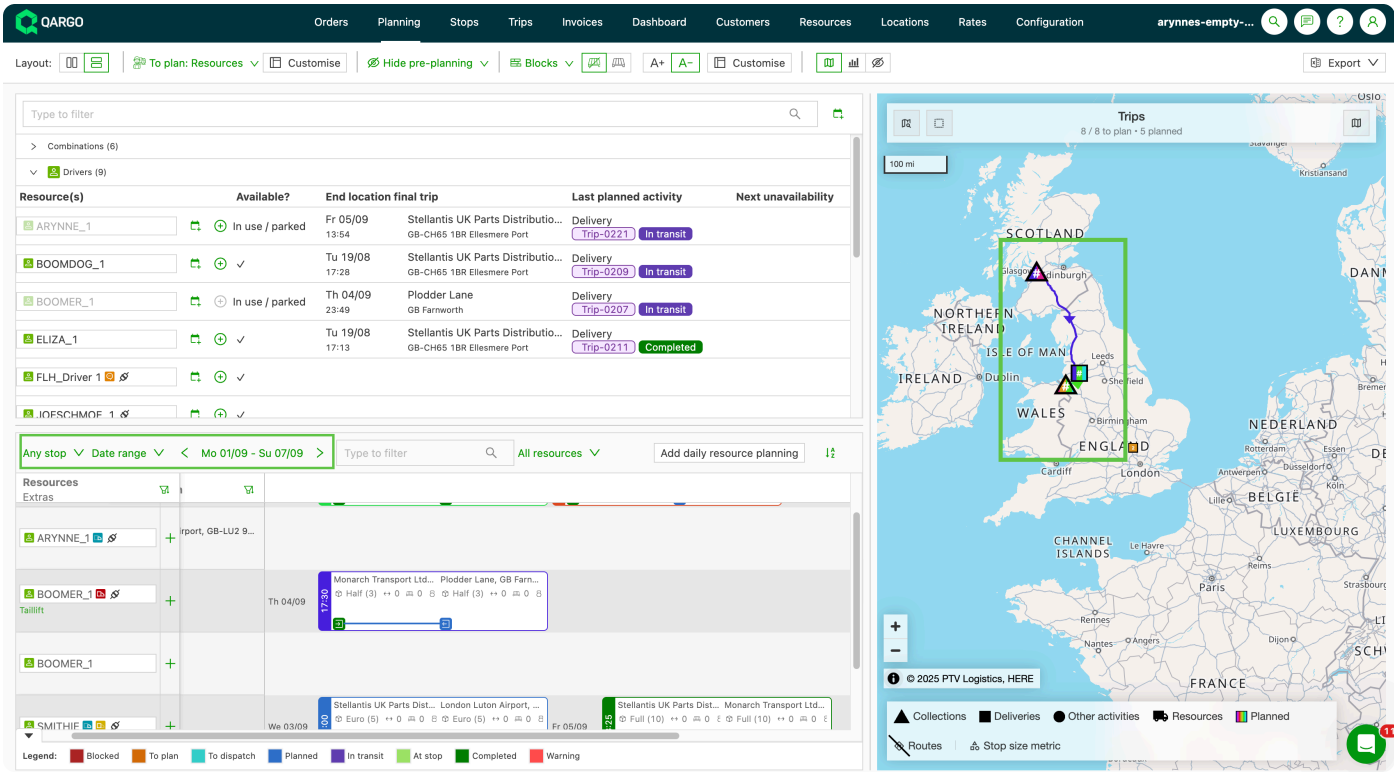
- **Center**: the preview slider appears in the center (default)
- **Right**: the preview slider docks to the right side of the screen
- **Bottom**: the preview slider docks to the bottom of the screen



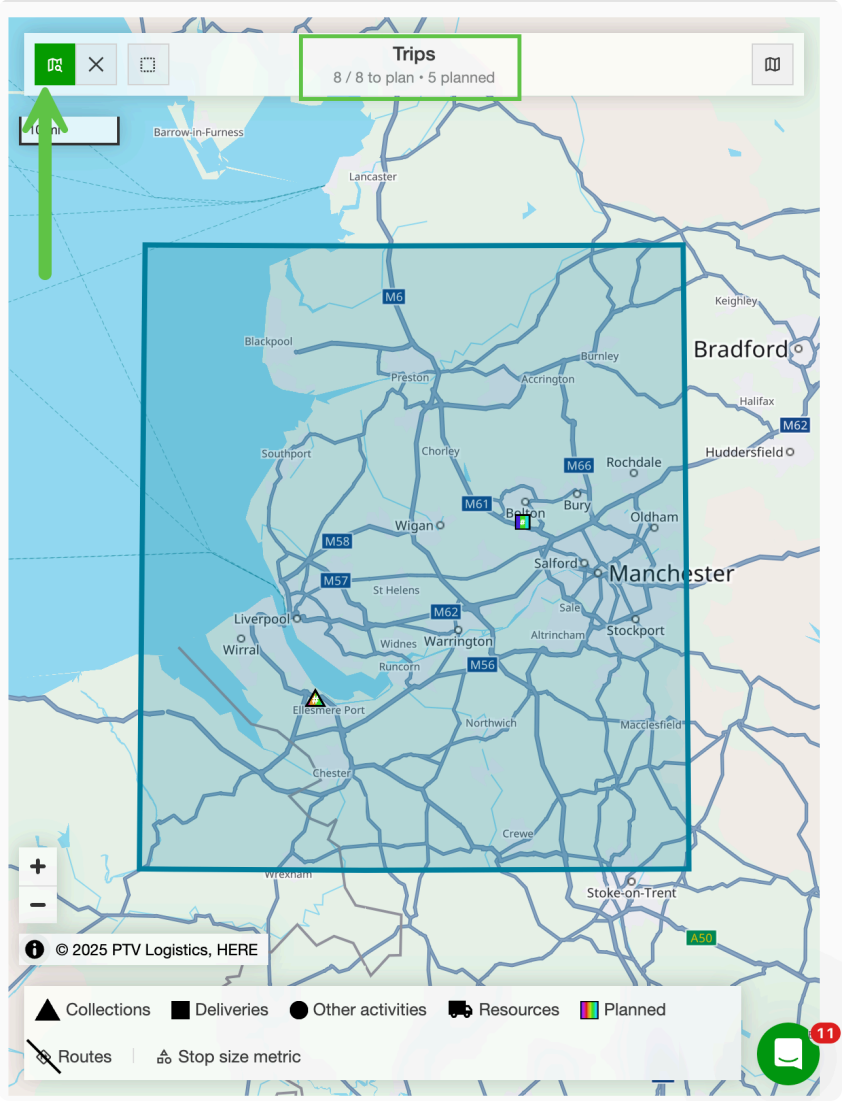

📚 Qargo saves the selected position, so subsequent detail views open in the same layout. Resize the preview slider by dragging its border.

## Map view

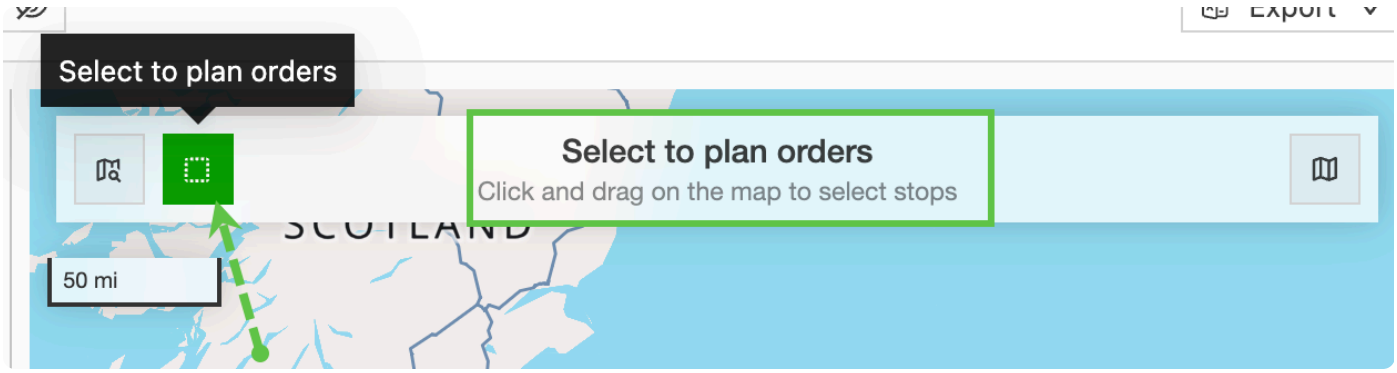
- Shows the data for the selected dates in the planning.




- Map view has its own filter options.
- Click the map icon to drag and highlight the area on the map to filter
    - The header displays orders to plan and loads planned



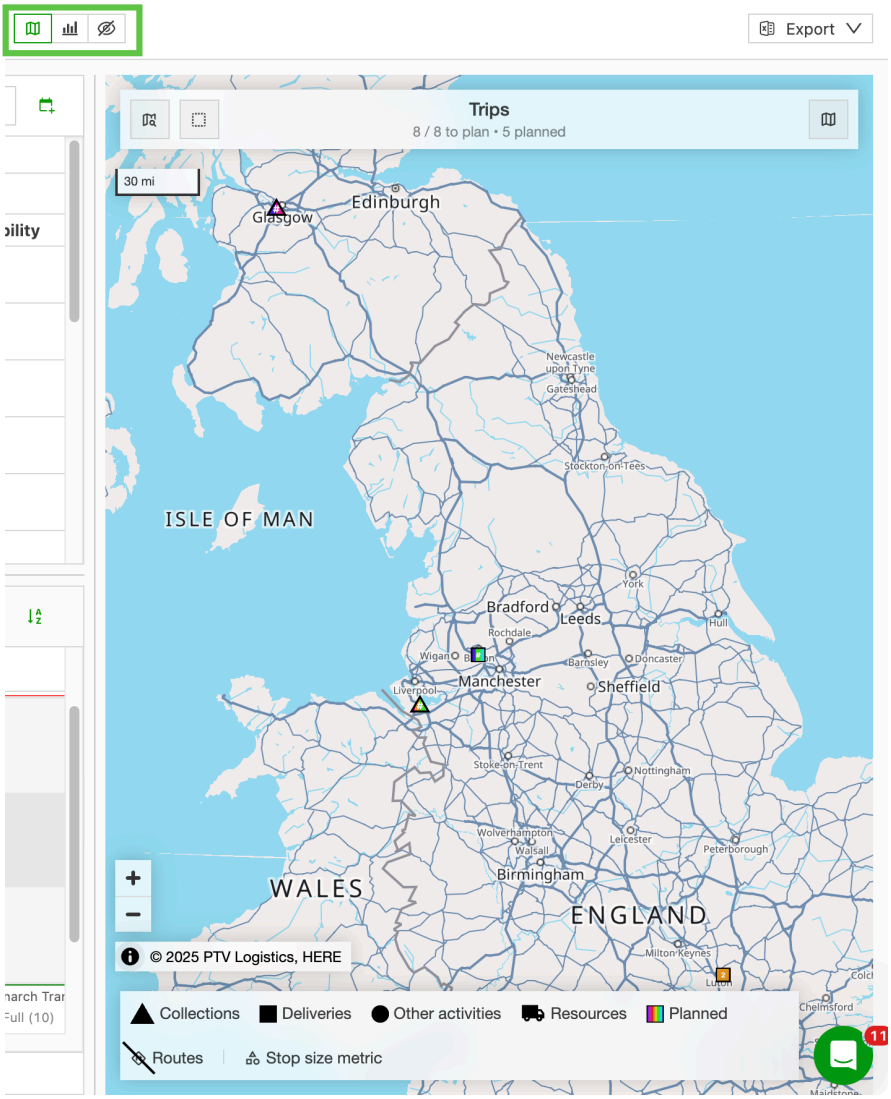

- Select or ‘draw’ the area on the map to plan orders

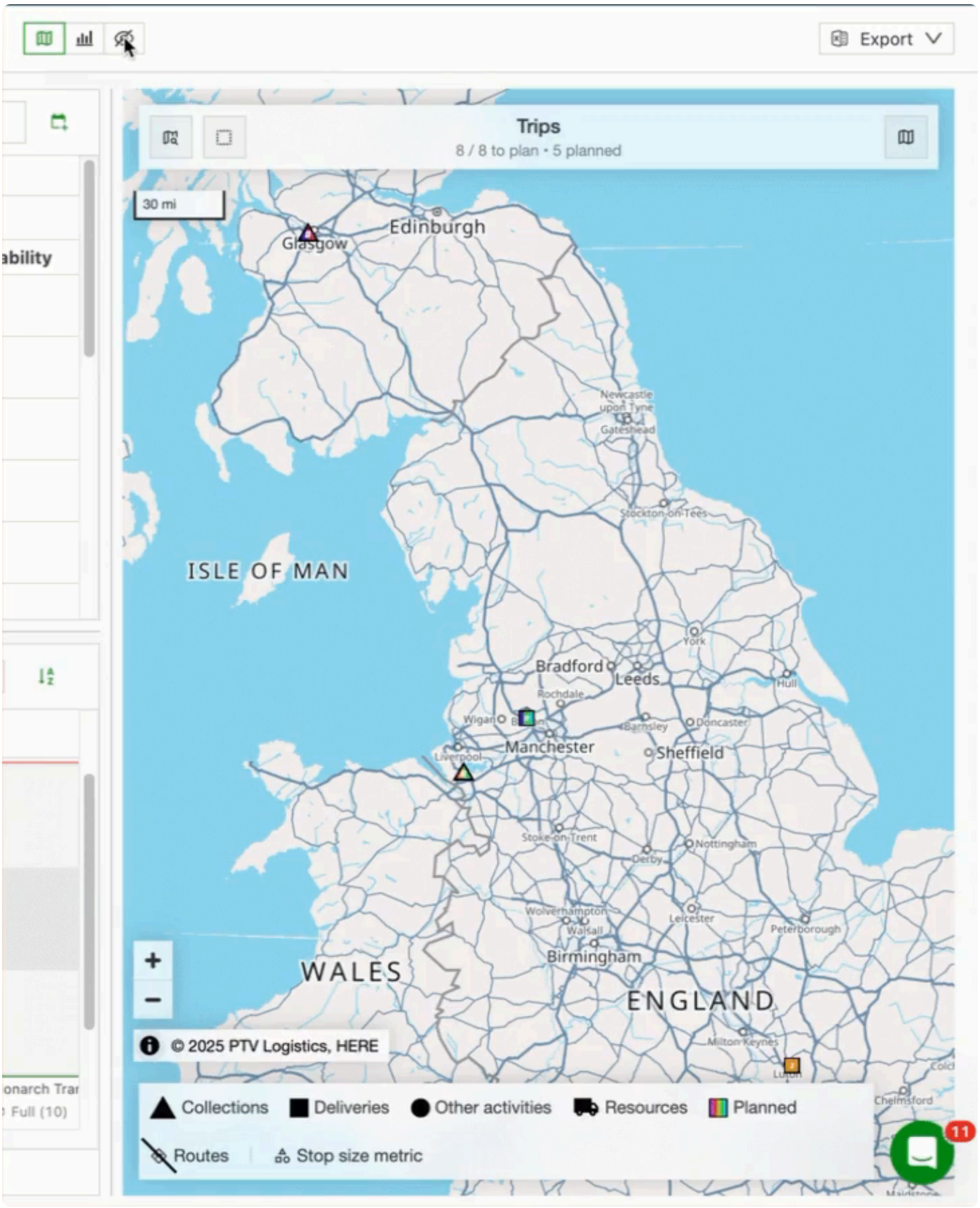



- Map overlays are available for routing through LEZs, checking truck restrictions, etc.




- Map visibility can be set on/off or replaced with order stats if preferred.


Export
Trips
8 / 8 to plan • 5 planned
30 mi
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Gateshead
Stockton-on-Tees
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Bradford
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Rochdale
Wigan
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Manchester
Liverpool
Sheffield
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Deliveries
Other activities
Resources
Planned
Routes
Stop size metric




To learn more about map functions, see the articles below 👇
Planning – Map features and functions

Planning – Map visualizations

‼️ Custom column views (both the order and the size) are **retained by the browser**. If cookies are deleted, or the browser is configured never to store cookies, the views are not saved and reset to the default the next time Qargo is used.