Planning: board filter options

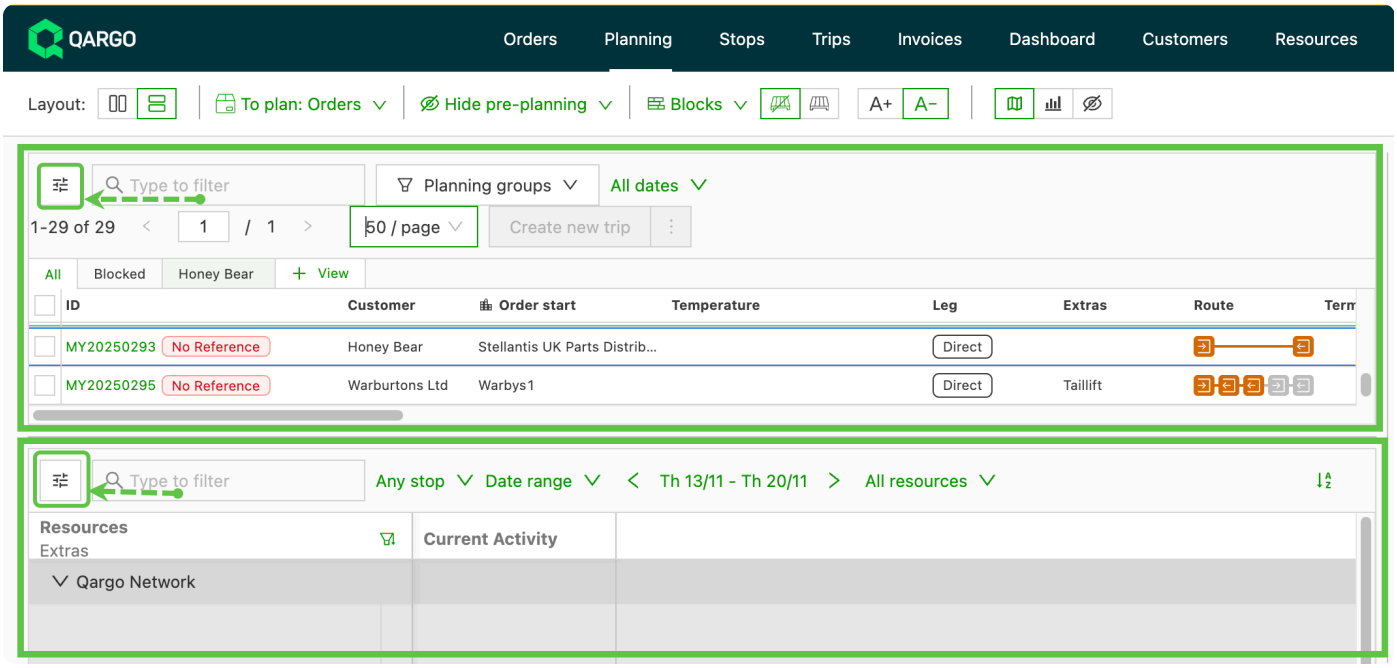
Plan faster with planning board filters: date range, resource availability (loads and current time included), custom fields, column headers, location and customizable Timeline and Blocks views.

Updated October 23, 2026

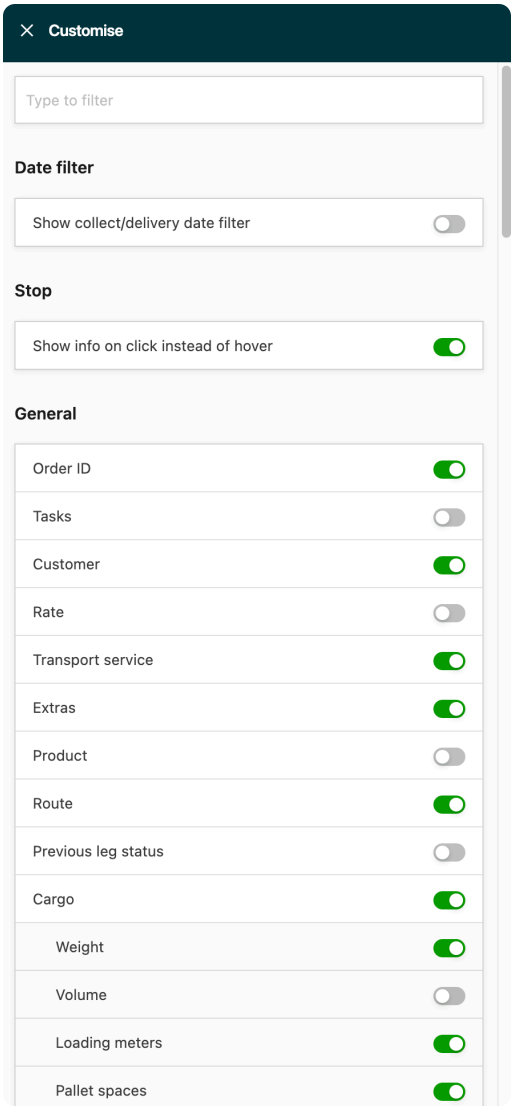
Filter data using the *'Customize'* view option



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

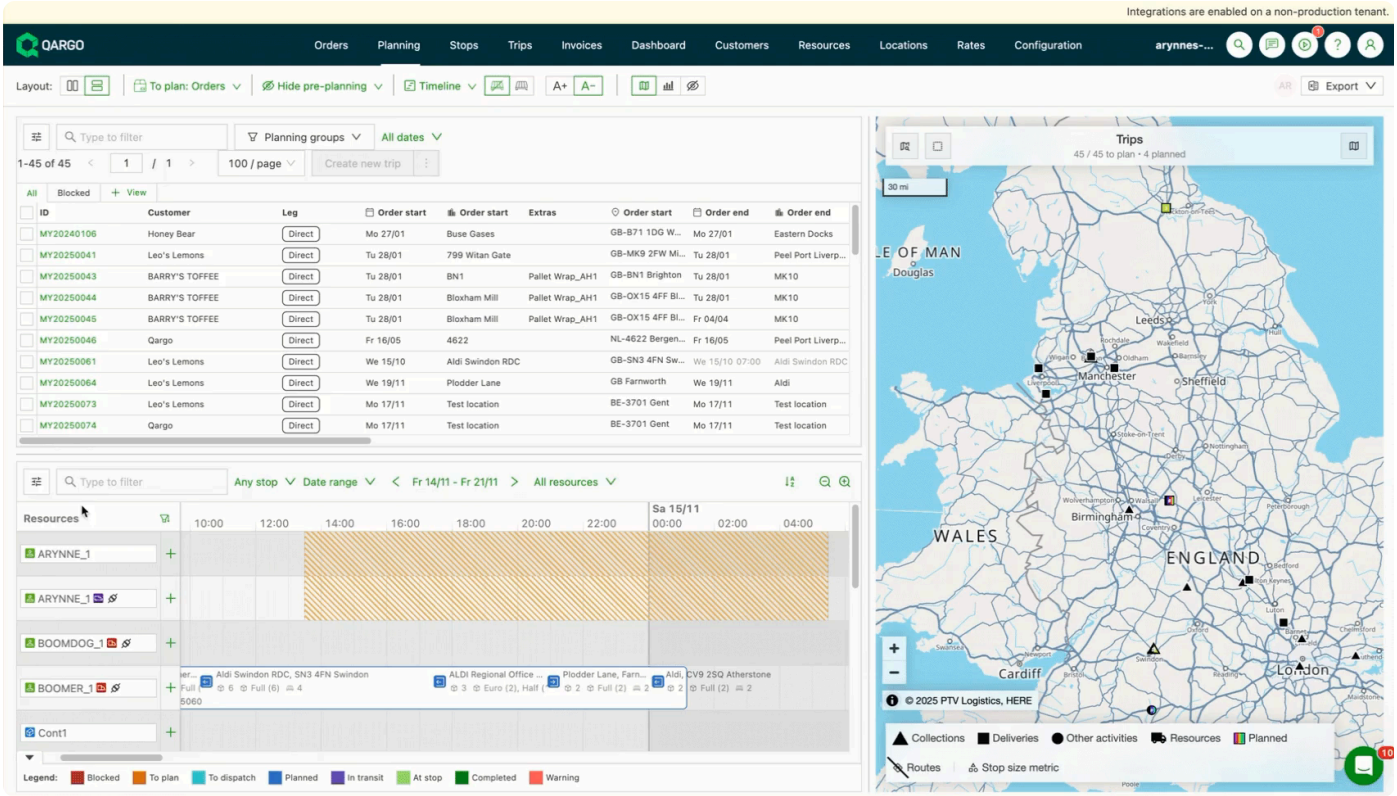


- Each option opens the Customize panel, where users can toggle on/off the specific data sets to include or exclude in the view

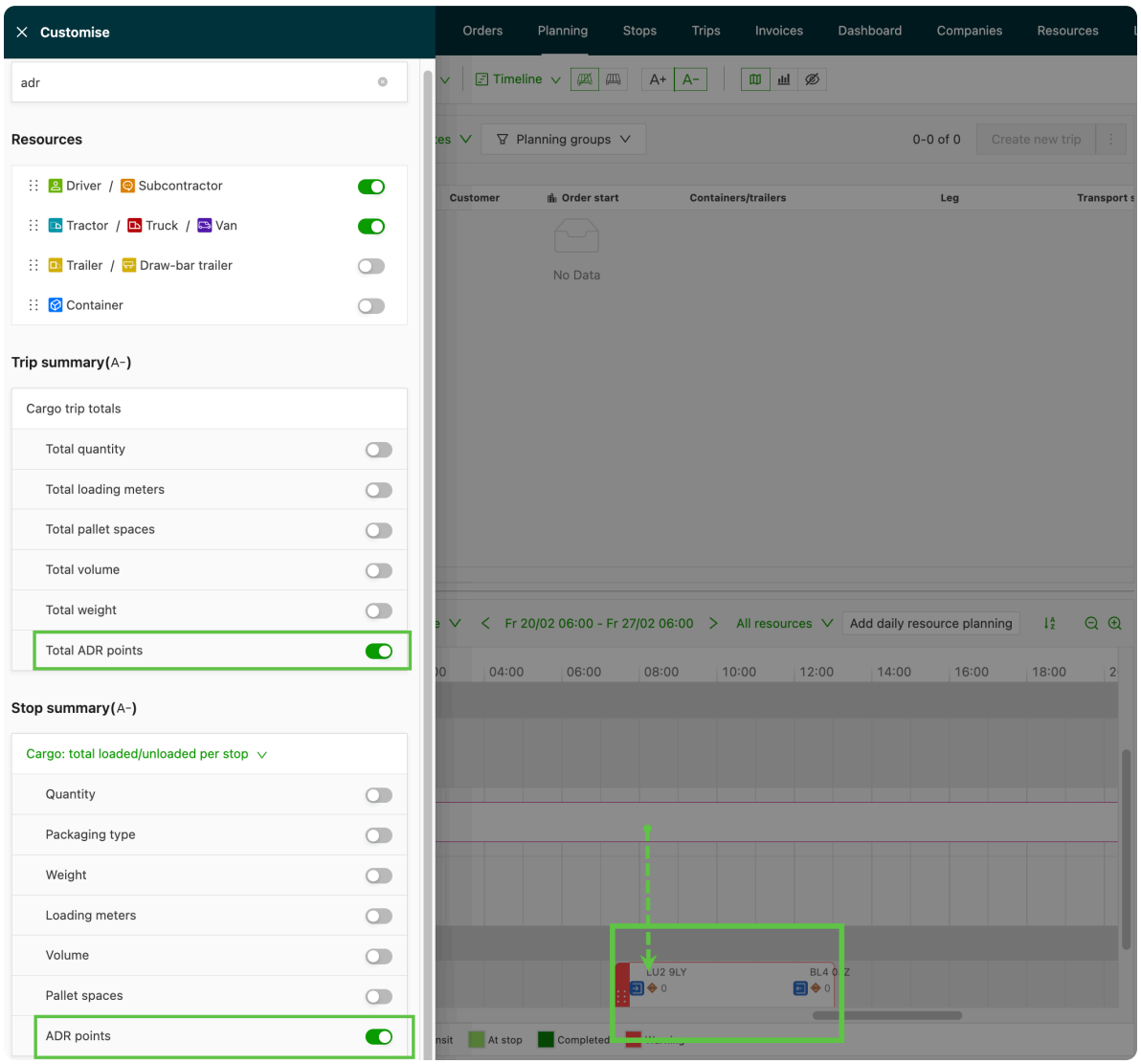


- To maximize the screen view on the plan board, use the ***Customize*** option on the A+/A- views and toggle off any data that isn't required.
- Reducing visibility in this way reduces each load to a much smaller line on the board.

📚 If the Route option is toggled off, the stop activity icons still show in the load row on the plan board. This allows users to keep track of the load progress visually.

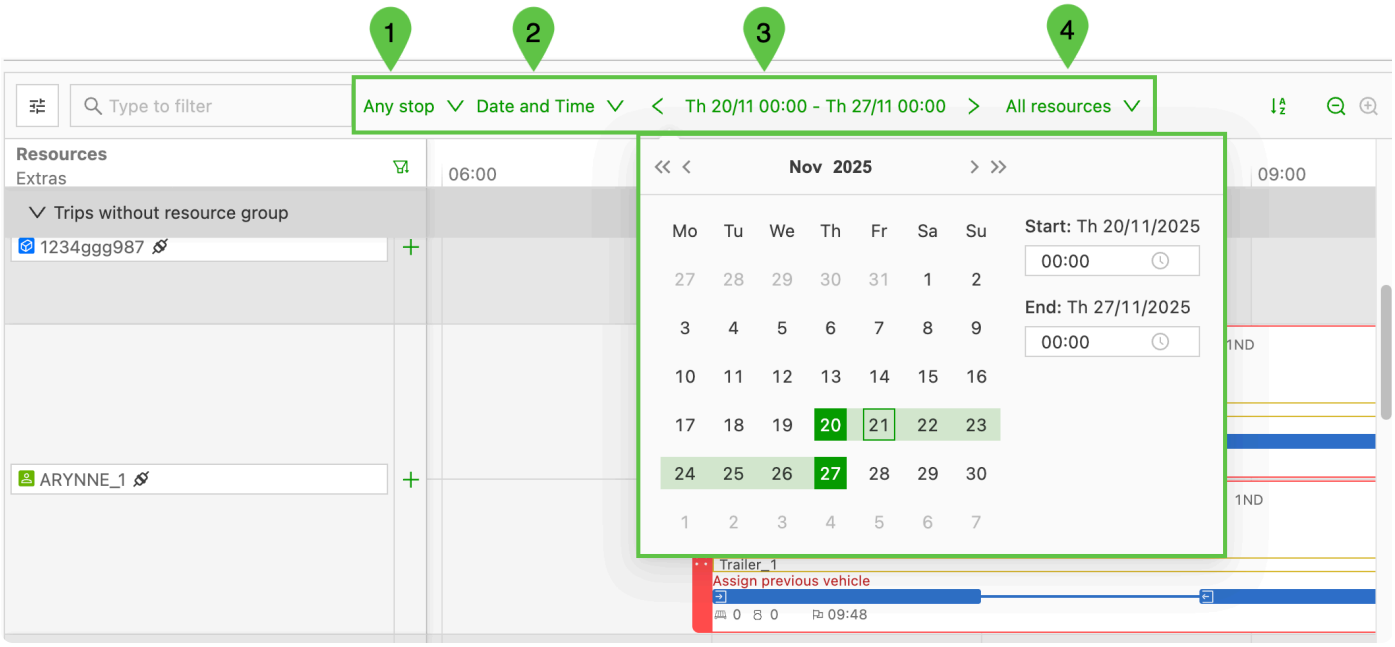


- Including **HazMat points visibility** in load details shows the ADR icon, making it easy for planners to identify loads



Filter by date / time

Users have the additional options to select a specific number of days and a **date** and **time range**.



1. Any stop or Start load: The default is 'Any stop'. Manually update to 'Start load' to only see loads ***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 resources / 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 pickup & delivery

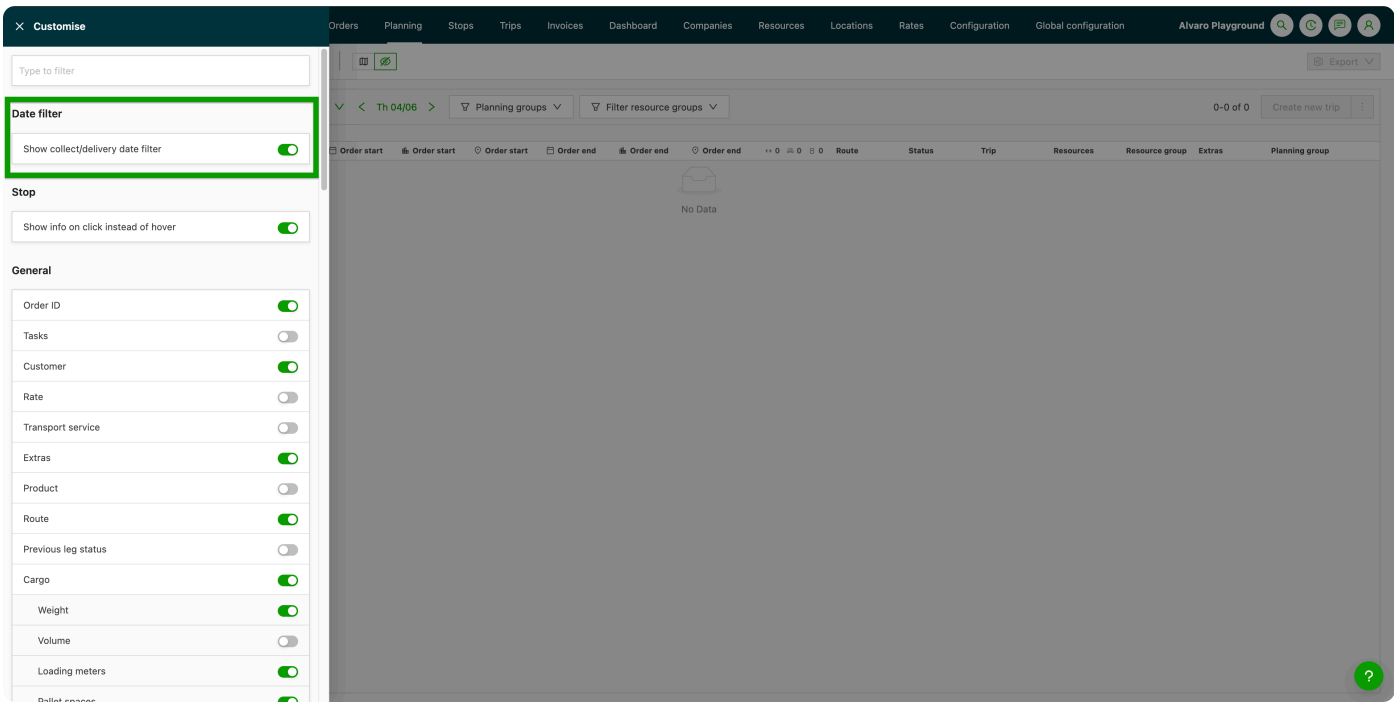
The **Any date between pickup & delivery** option applies a broader check: an order appears in the ***To Plan queue*** if any date in the selected range overlaps with the full pickup-to-delivery window, inclusive of both the pickup and delivery dates.

Use cases:

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

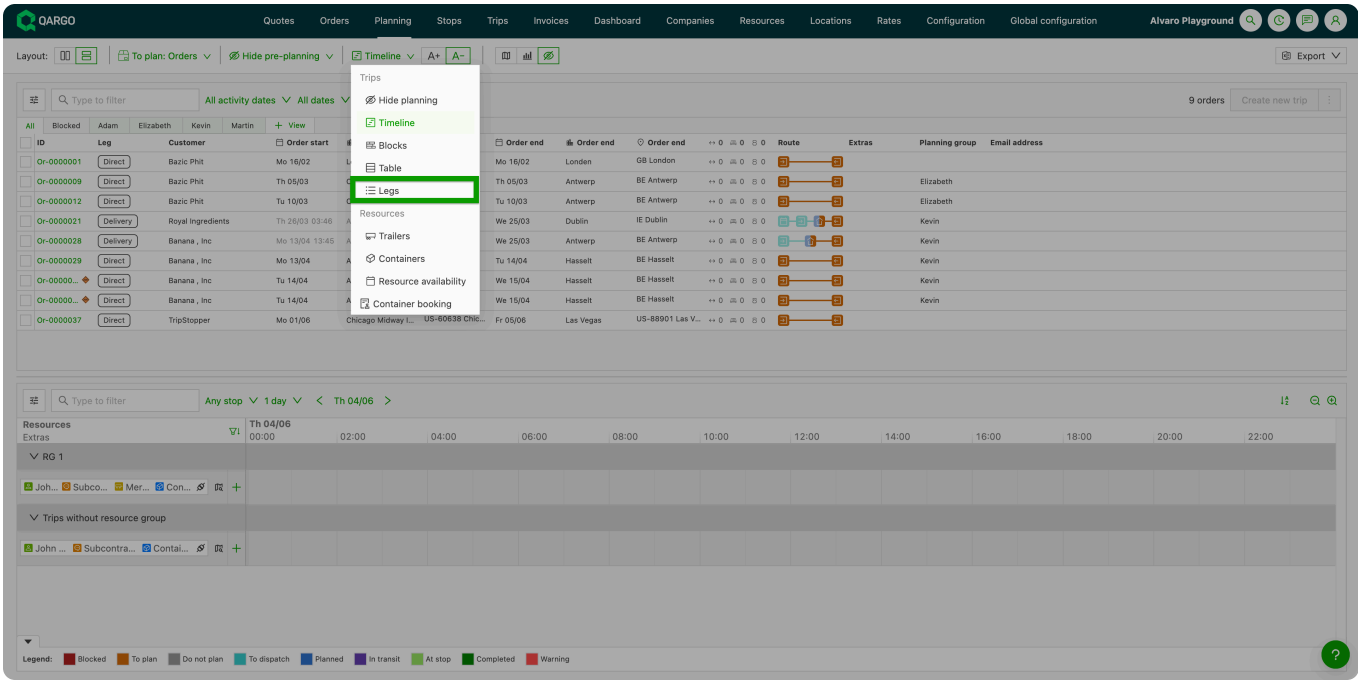
Prerequisite:

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

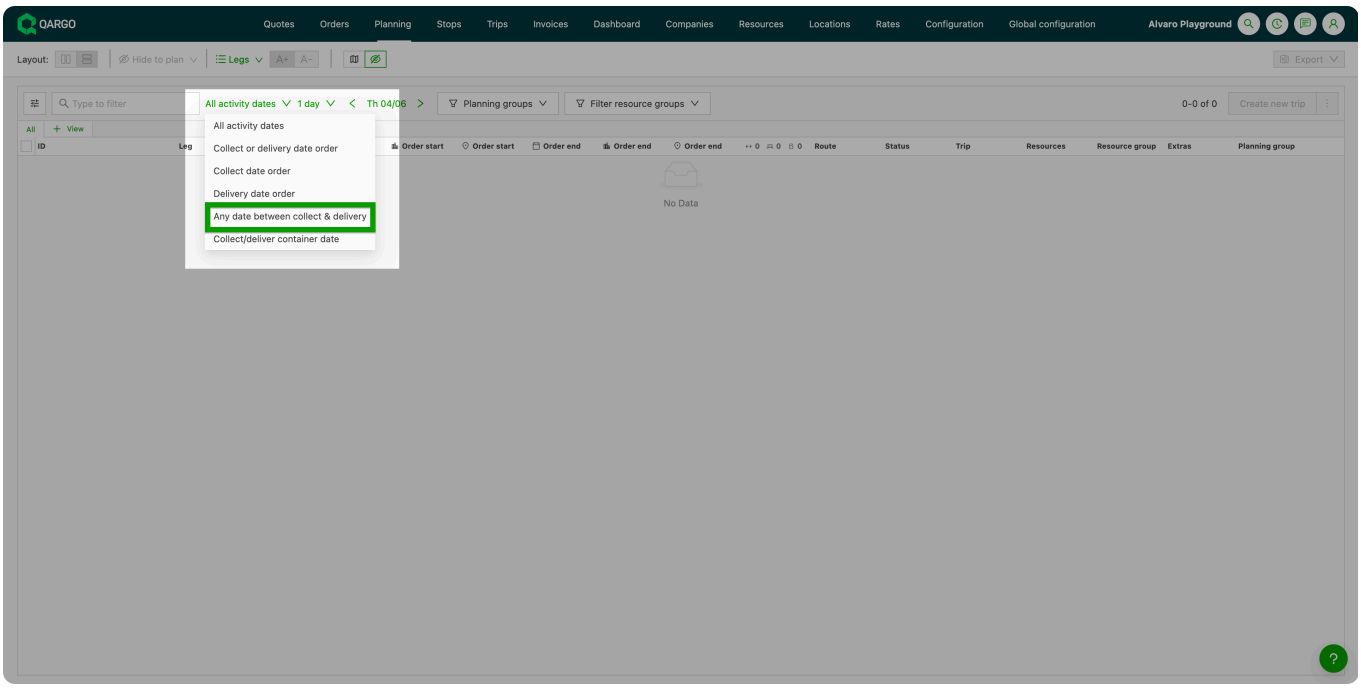


Steps:

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 pickup & delivery**.



All orders with a to-plan stop dated anywhere within the selected range 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 may not appear as expected.

Filter by column headers

- Hover over the column header to display a 'funnel' icon. Click it to show the available filter options.
- Filter options vary depending on the specific column, but can include:
  - Customer
  - Leg
  - Date and time options

Filter by location

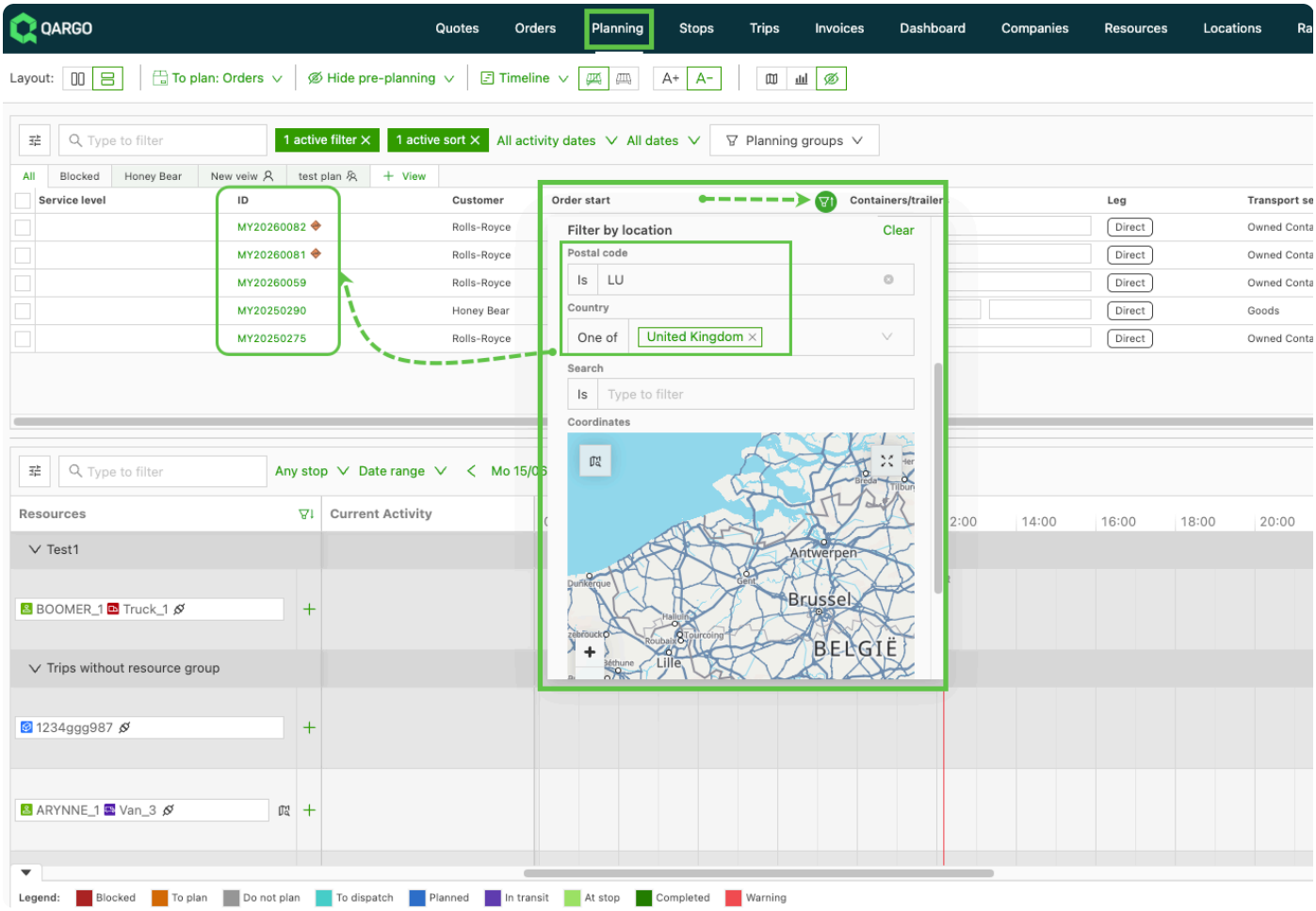
The location column filter shows its sub-fields (Search, Location, ZIP code, Country and Coordinates) simultaneously. This enables complex, multi-field searches with **"AND"** logic across all application screens, without the need to toggle between options. The enhanced functionality streamlines workflows and enables specific queries, such as filtering for both countries and ZIP codes at once.

📚 Location filtering is also available in the Orders and Loads 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 *ZIP code* starts with 25, to return only rows matching all conditions.
4. **Apply** the filter; it also combines with filters set on other columns.



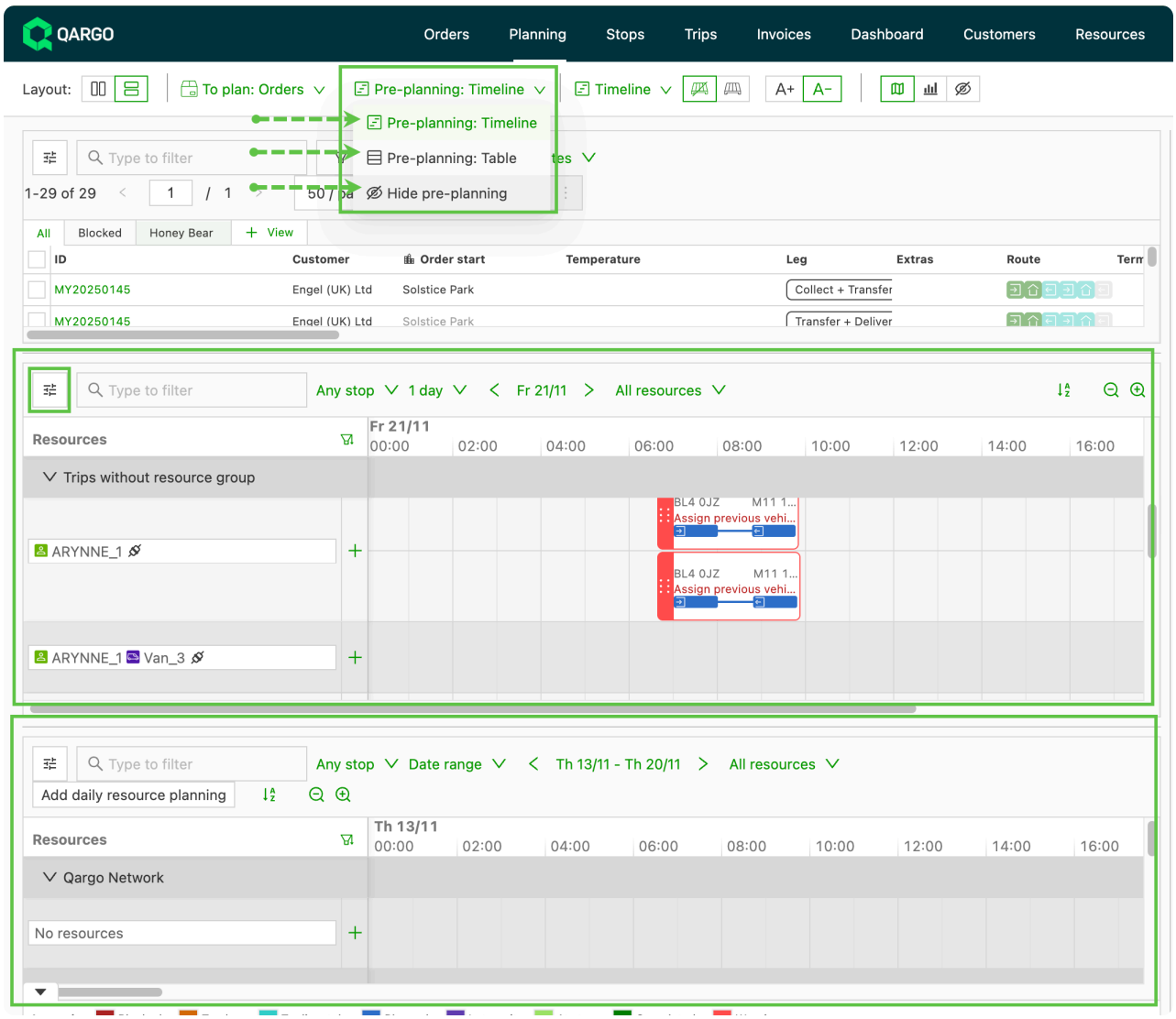
Saved views

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

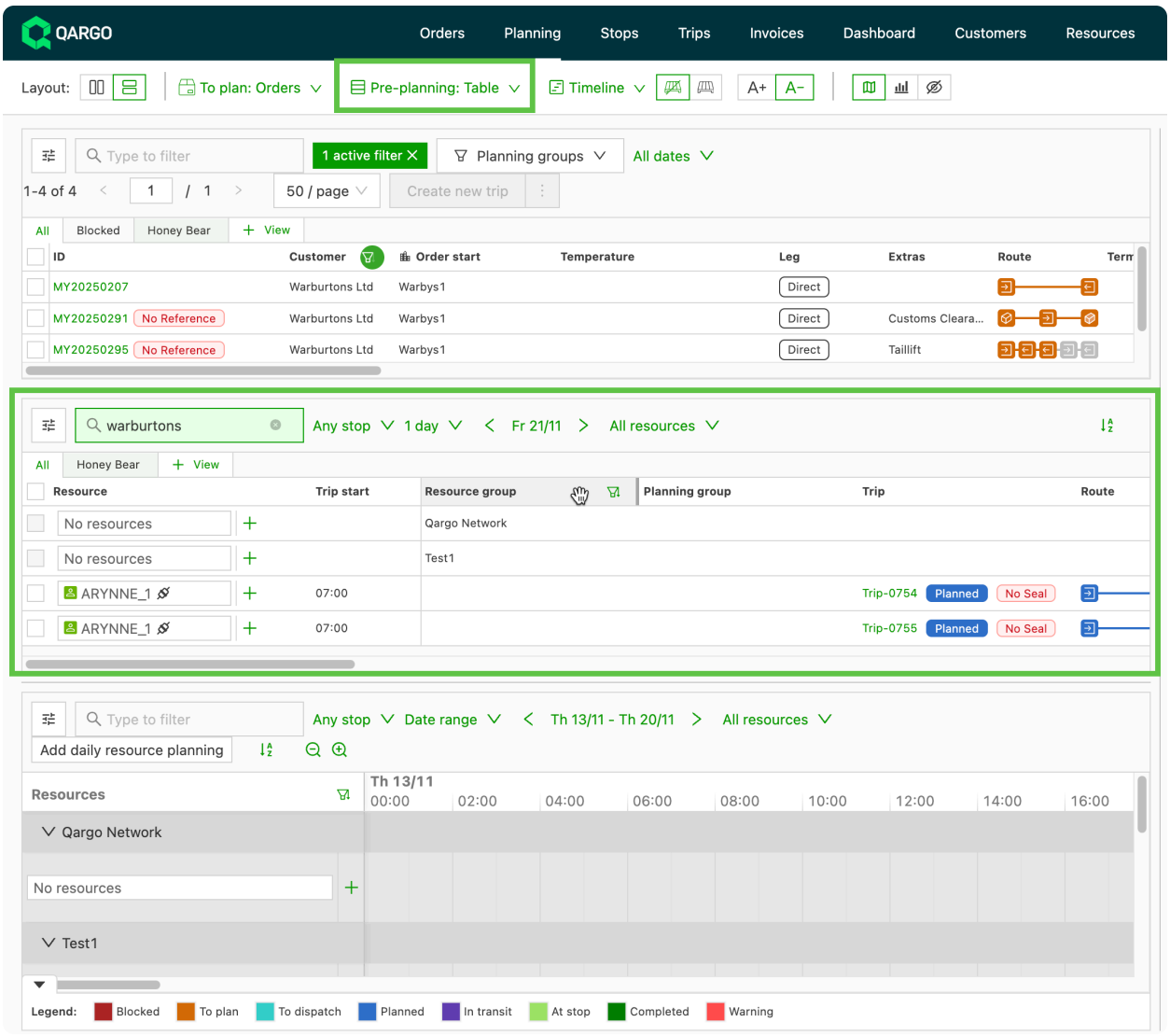
> ‼️ Sections always combine with **AND**; there is no AND/OR choice.
> The *Search* and *Coordinates* filters keep their current behavior; only their position changes as they move out of the dropdown.

Planning & pre-planning views

- Separate views are available for the planning and pre-planning tables.
    - Pre-planning is matched to the plan board, i.e., if Timeline is selected, it is shown as the default.
    - Manually update to use the Table for a simple row view



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



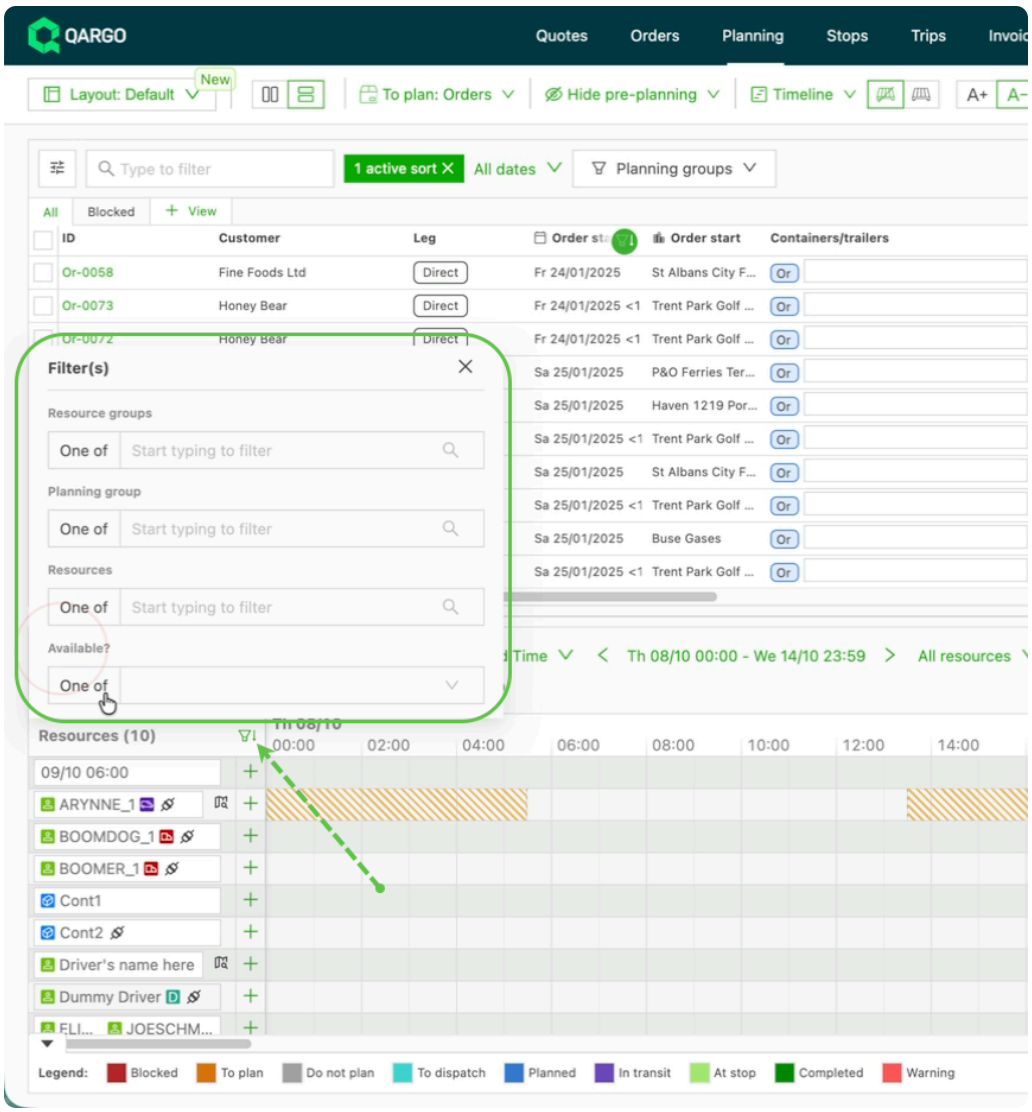
Filter by resource availability

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 loads***, and it ***only counts the time from now onward***.
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:

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

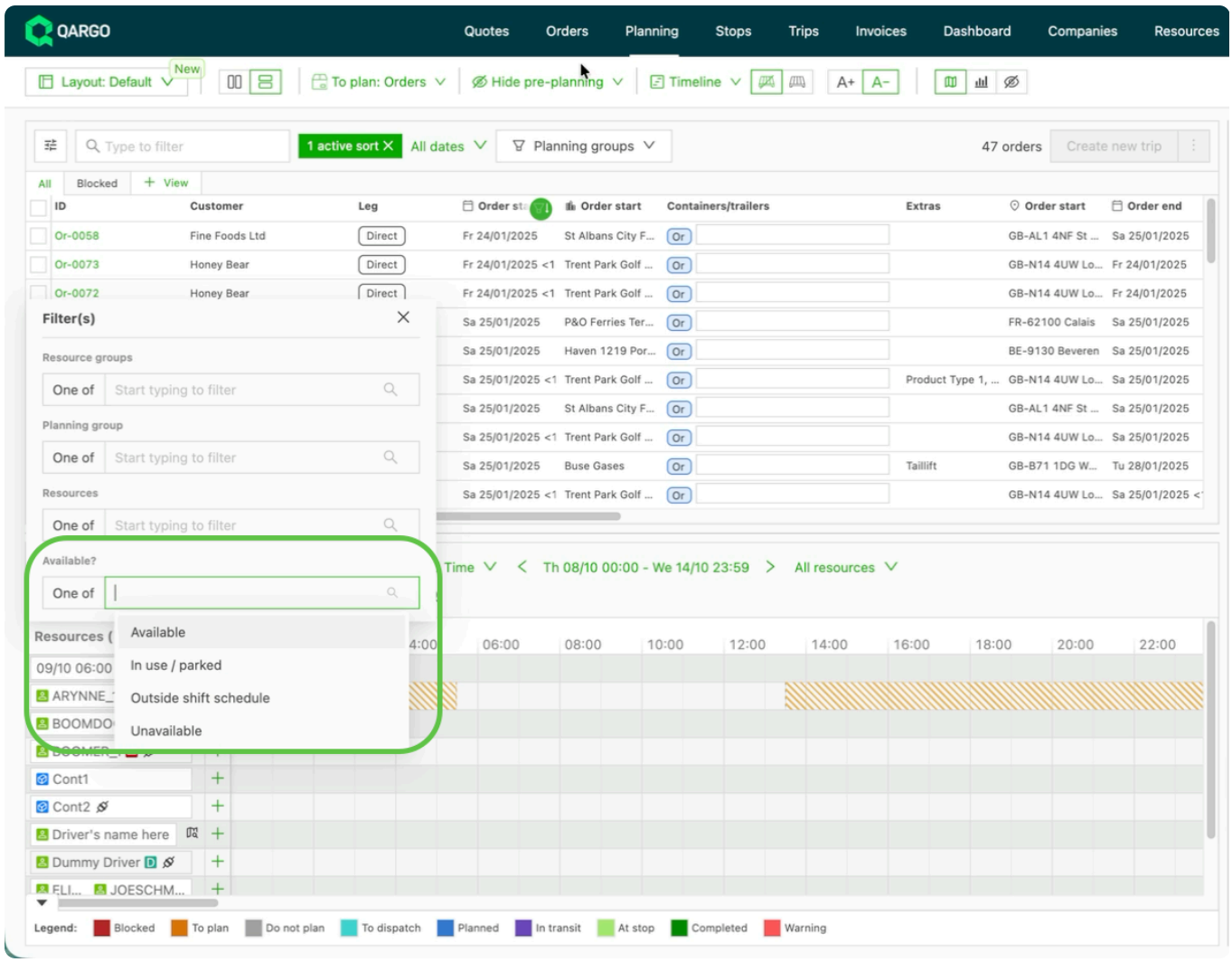
Apply the Available? filter

1. **Open** the planning board and **set** the date range with the date selector.
2. **Click** *Filter(s)* in the *Resources* column header.



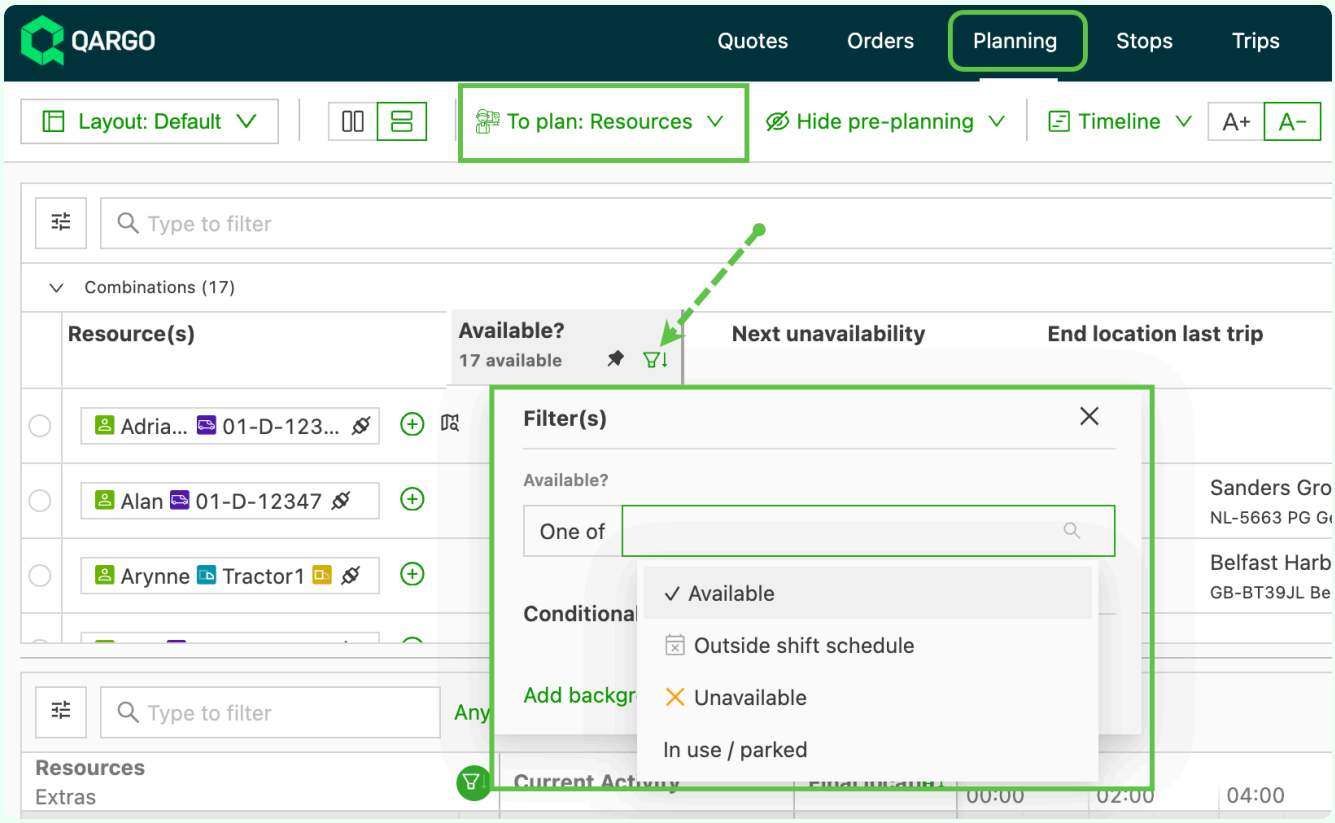
3. **Select** *Available?* and choose an operator: *Is*, *Is not*, *One of* or *Not one of*.

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 loads 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 *Loads: Timeline* does not change the *To plan* or *Pre-planning* panel, and vice versa.

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 loads, on any day in the range.
- **Loads and unavailabilities that cross the red line still block.** A load that started this morning and runs until 6:00 PM blocks the resource until 6:00 PM.
- **Planned, in-progress and completed loads block.**
- **Canceled loads never block.**
- **Trailers are freed at their drop stop.** A trailer dropped mid-load becomes available after that stop, while the truck stays blocked until its load ends.
- **The filter updates every minute.** As the red line moves, a resource whose load 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 loads 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 load date filter	With the Planning date filter set to *Start load*, a load 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 (vacation, 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 loads after the red line. Any free time, however short, keeps the resource *Available*. A reservation also does not block.
A truck with a canceled load shows as *Available*	Expected. Canceled loads 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 loads	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.

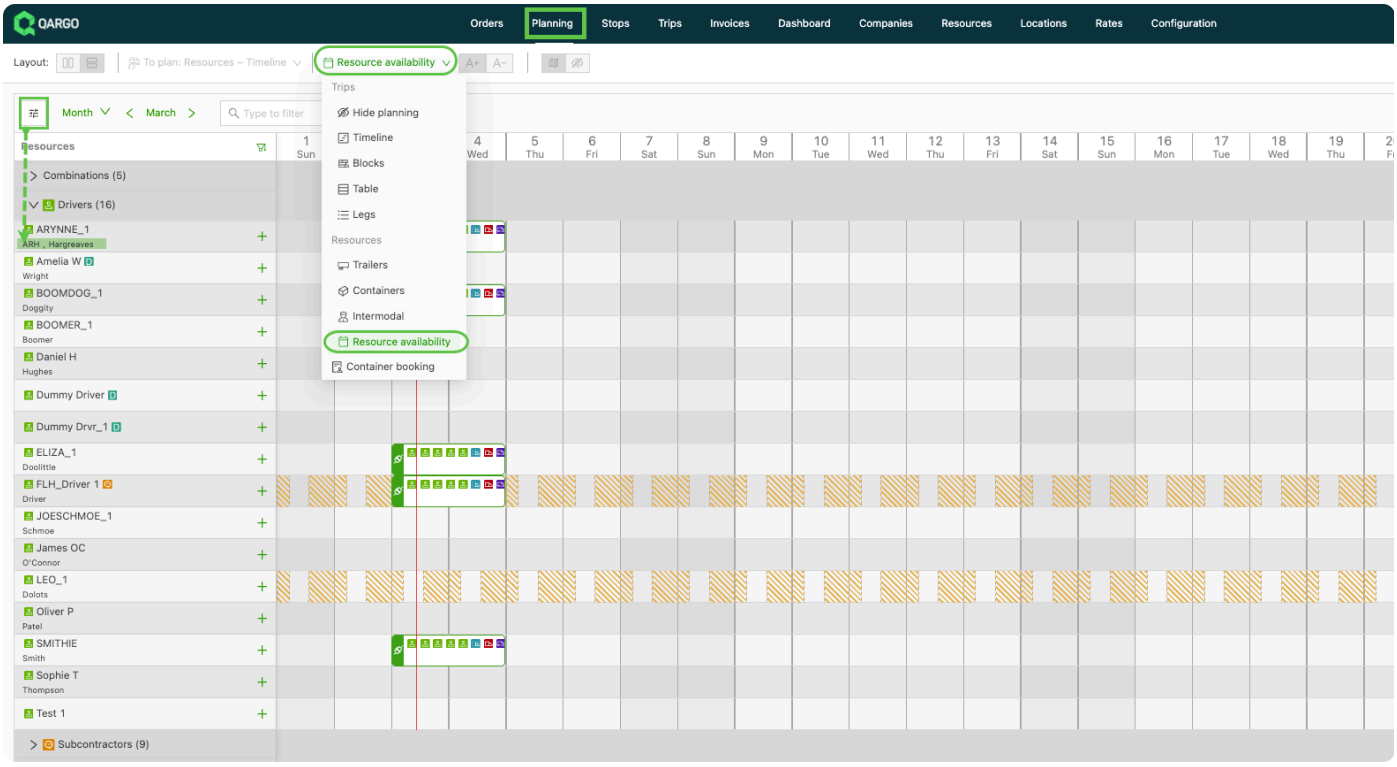
Filter by custom fields in To Plan Resources

Transport companies managing large fleets can now bring custom resource fields directly into the ***To Plan Resources*** **panel** and filter the resource list by those fields.

📚 This removes 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 the resource name)
- *Resource Availability* view (custom field values visible below the resource name)

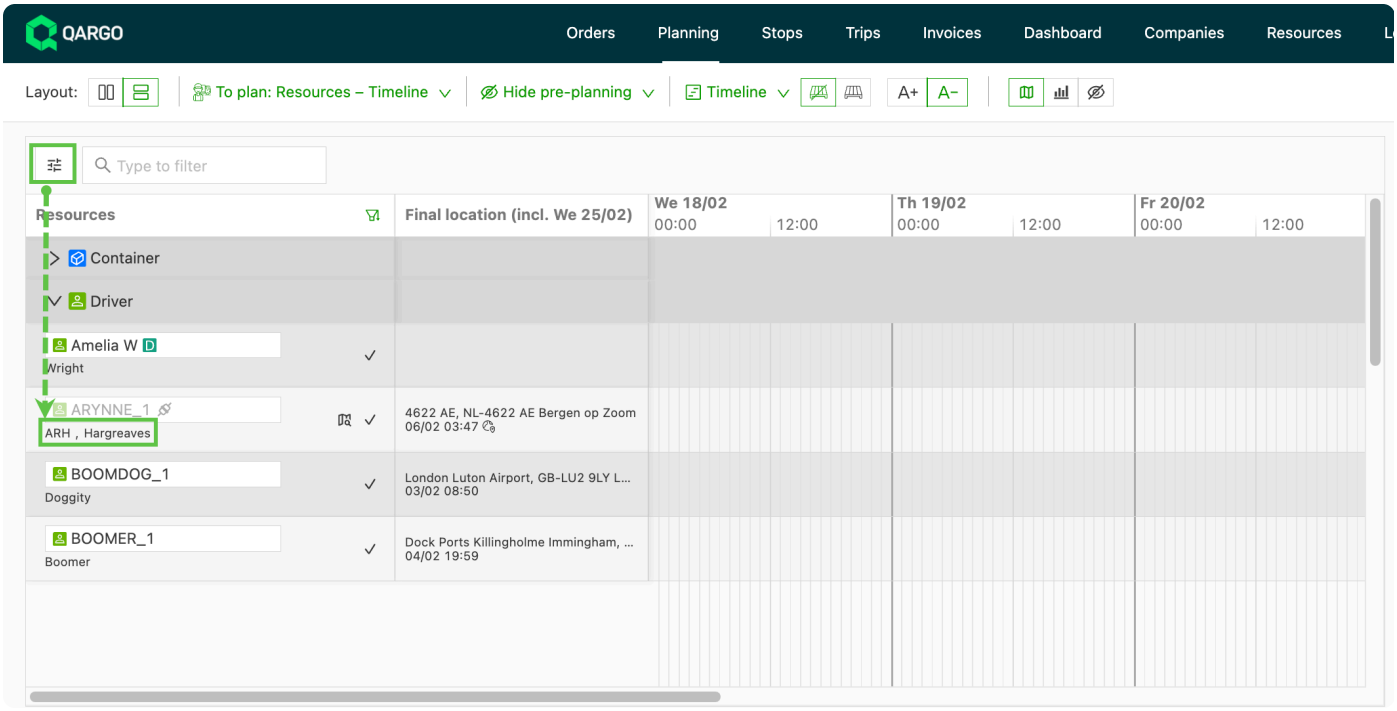


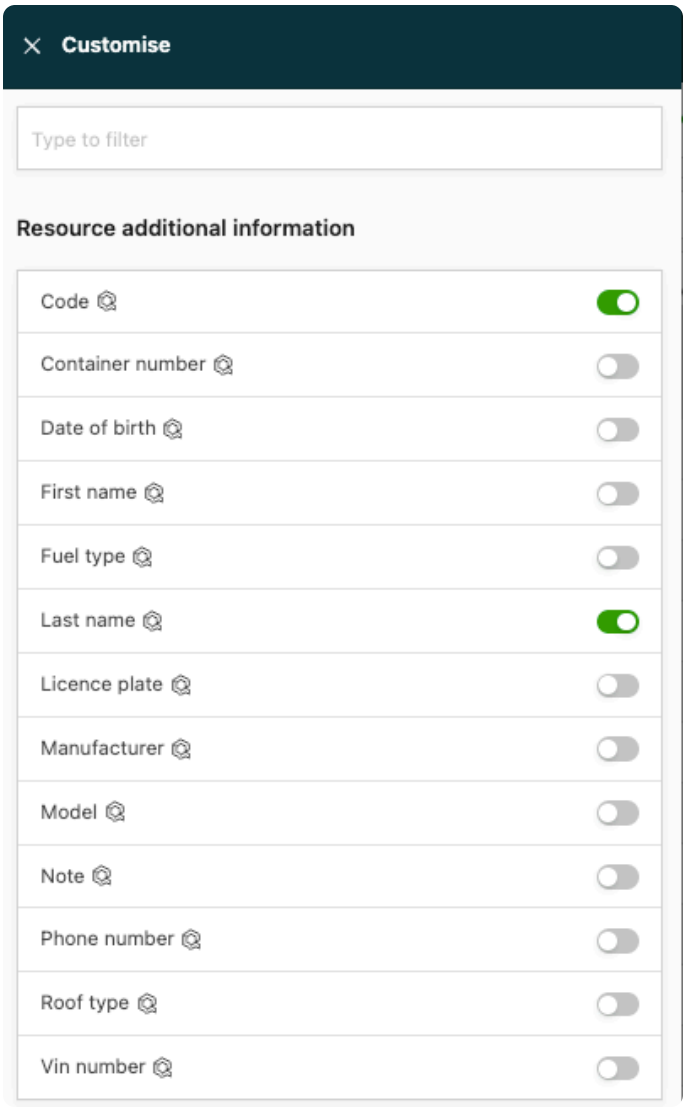
Show custom field columns in To Plan Resources

Configure custom field columns

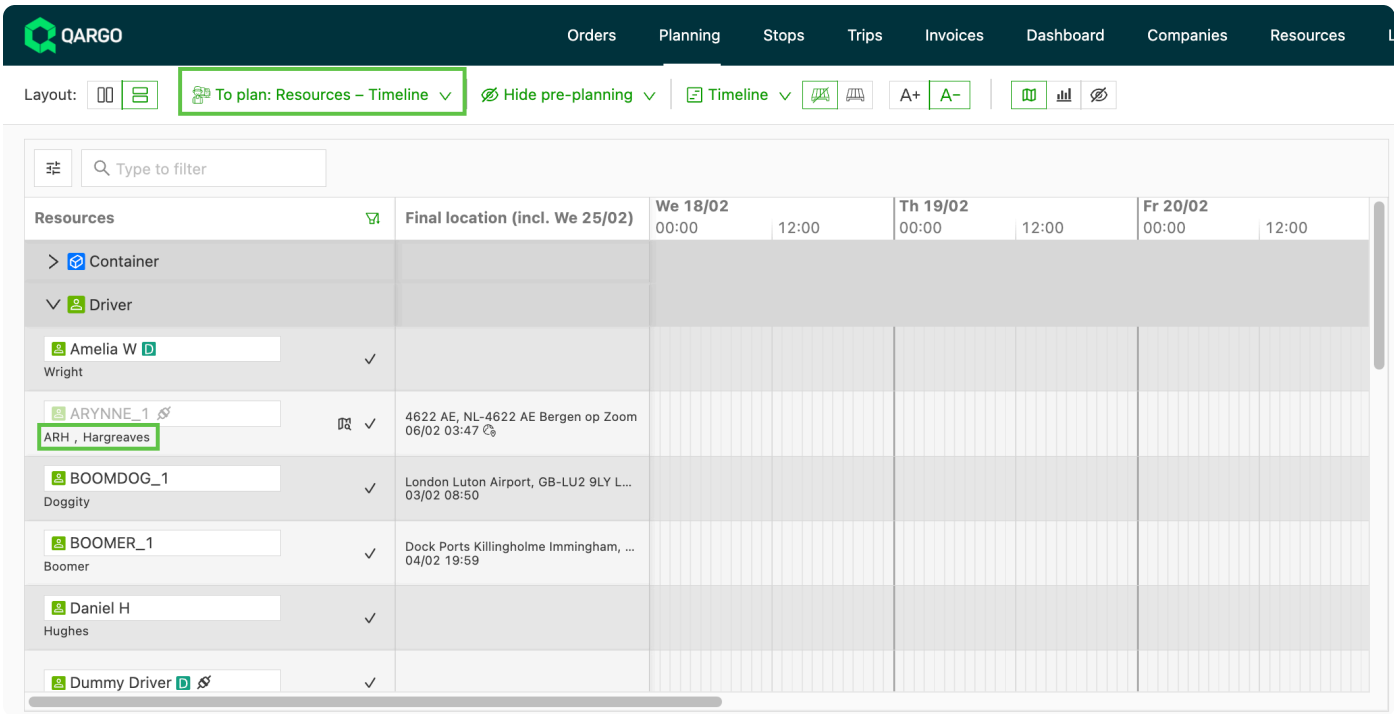
1. **Navigate** to the planning board and open the *To Plan Resources* panel.
2. **Click** the *Customize* button within the To Plan Resources section.
3. **Toggle on** the custom fields to display as columns. Only fields that have been configured on the resource type appear here.
4. **Close** the Customize panel. The selected columns now appear in the resource table.

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

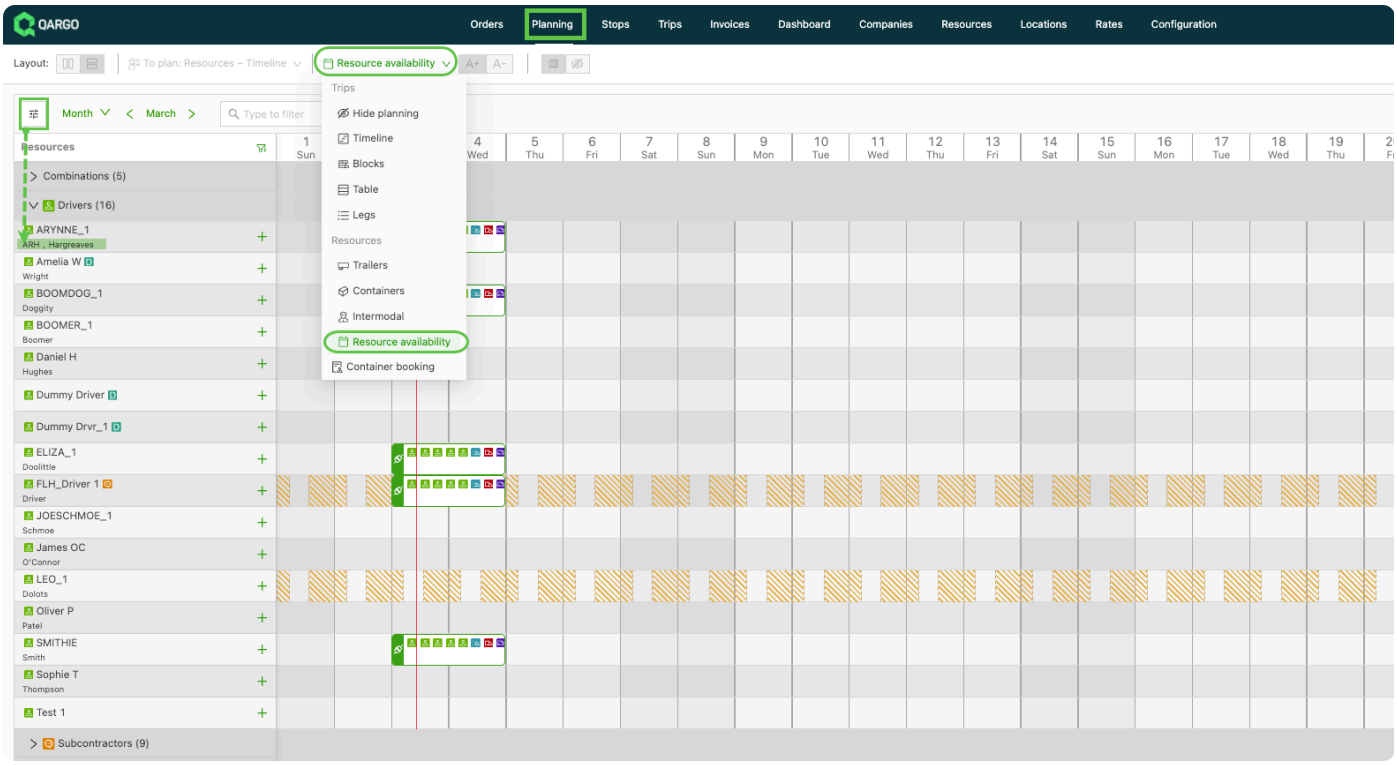

QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Layout:
To plan: Resources – Timeline
Hide pre-planning
Timeline
A+
A−
Type to filter
Resources
Final location (incl. We 25/02)
We 18/02
00:00
12:00
Th 19/02
00:00
12:00
Fr 20/02
00:00
12:00
Container
Driver
Amelia W
Wright
ARYNNE_1
ARH , Hargreaves
4622 AE, NL-4622 AE Bergen op Zoom
06/02 03:47
BOOMDOG_1
Doggity
London Luton Airport, GB-LU2 9LY L...
03/02 08:50
BOOMER_1
Boomer
Dock Ports Killingholme Immingham, ...
04/02 19:59


Customise
Type to filter
Resource additional information
Code
Container number
Date of birth
First name
Fuel type
Last name
Licence plate
Manufacturer
Model
Note
Phone number
Roof type
Vin number

- 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.

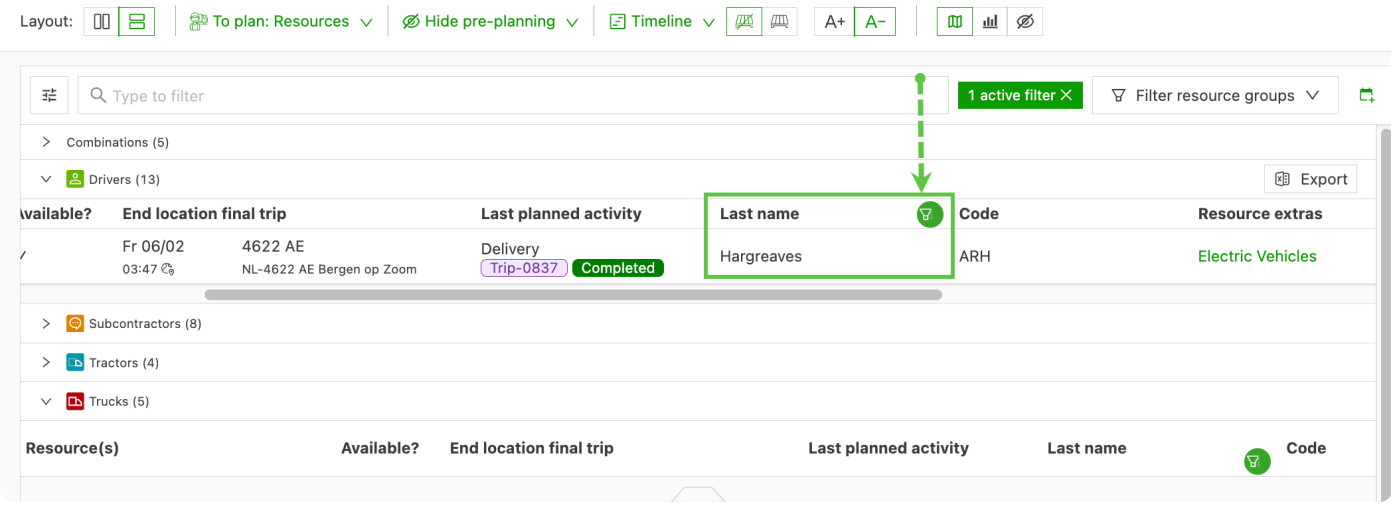


Filter by custom field values

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.



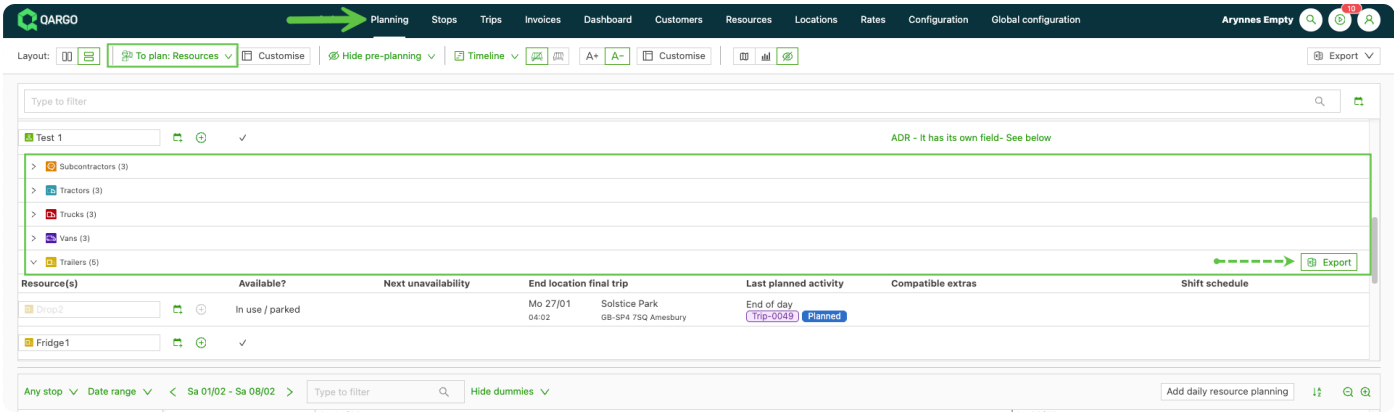
When one or more column filters are active, a ***Clear all filters*** button appears in the panel header. **Click** *Clear all filters* to remove all active column filters at once.

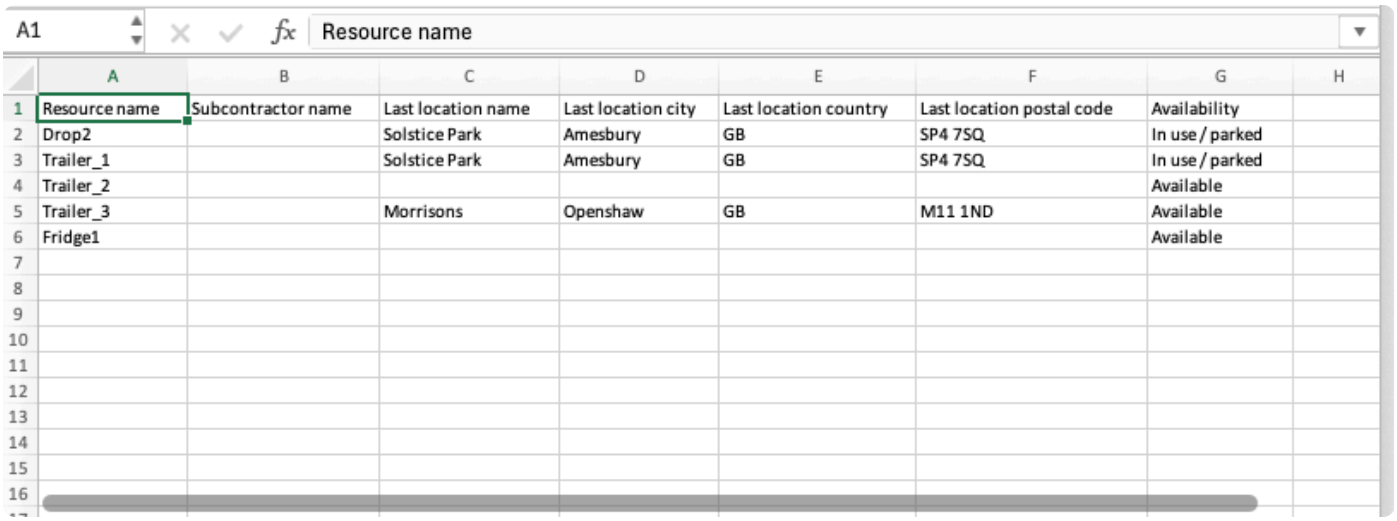
Limitations

Limitation	Details
Sorting not yet supported	Resources cannot be sorted by custom field column values. The 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 Customize 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. When hovering over each line, the Export option shows on the right side. The export shows the resource availability, including last location details.





	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								
8								
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