Planning: plan resource to order

Assign resources to orders, manage removal warnings, sort loads by planned start time on the planning board, and assign trailers to specific stops on a load.

Updated September 4, 2026

Summary

What: Resources (drivers, vehicles, trailers, containers) can be assigned directly from an order, so loads stay visible and manageable on the planning board. A sort option lets planners keep loads in their originally planned position, even when actual operations times differ.

Why: Planners need a reliable way to assign resources without leaving the order. They also need the planning board to stay stable when loads start later than planned. This prevents missed or overlooked work.

How: Open an order, assign resources from the resource panel, then view and manage the load on the planning board. Use the sort menu to switch between sorting by actual start time and sorting by planned start time.

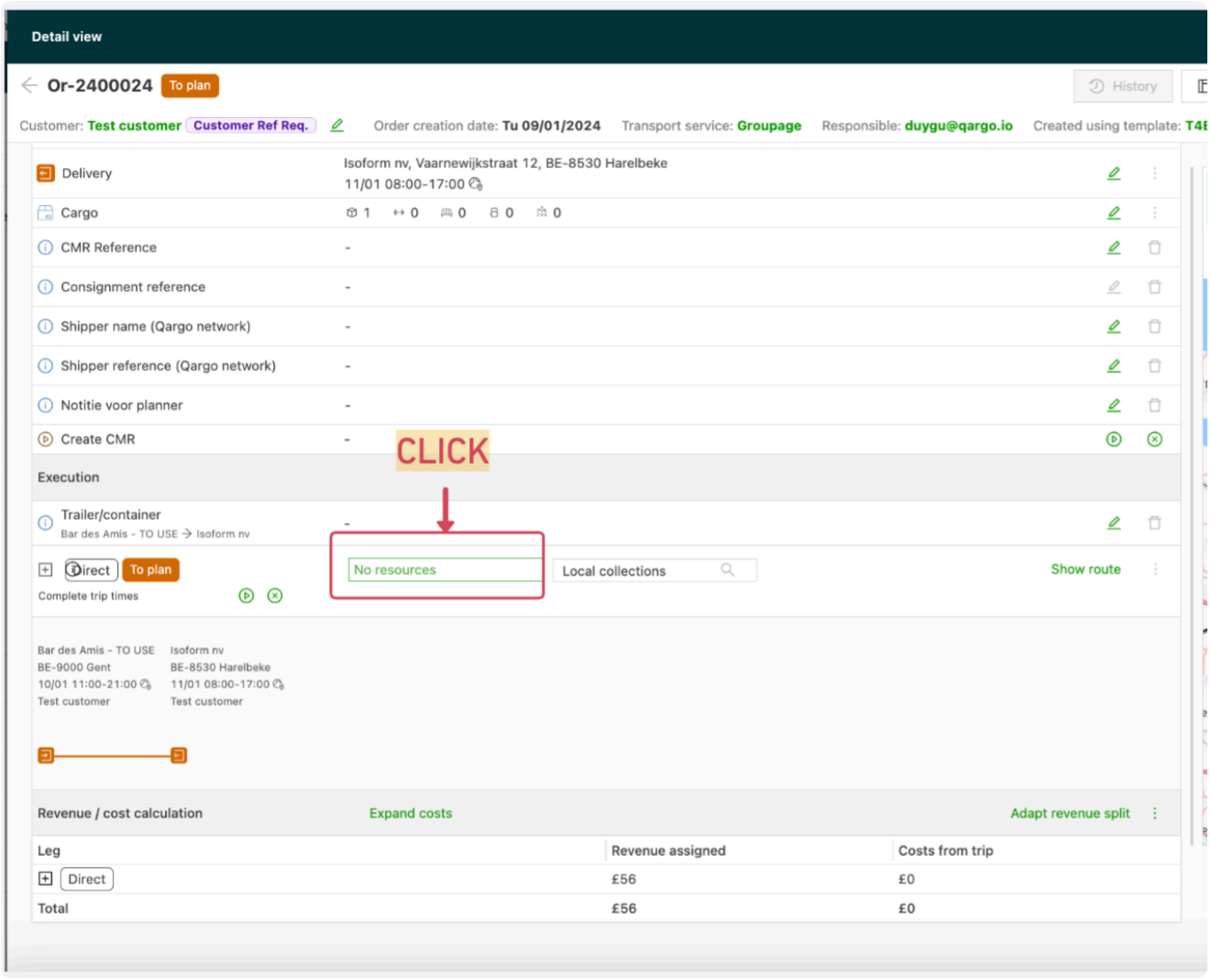
Terminology

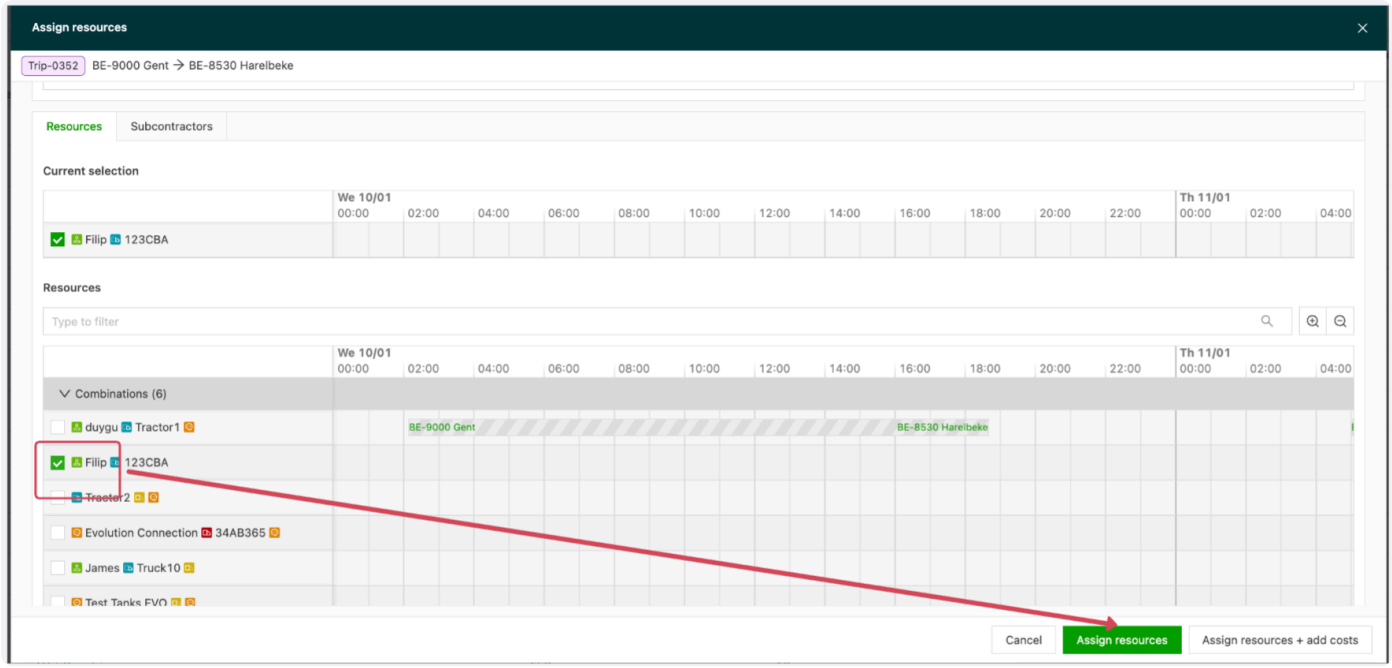
Term	Definition
Resource	A driver, vehicle, trailer, container, or chassis assigned to a load.
Resource line	A row on the planning board that represents a single resource.
Planned start time	The start time set when the load was last manually planned (created or moved on the planning board).
Actual start time	The operations start time tracked by the system, based on driver activity or status updates.
Load	A journey created from one or more orders and assigned to resources on the planning board.

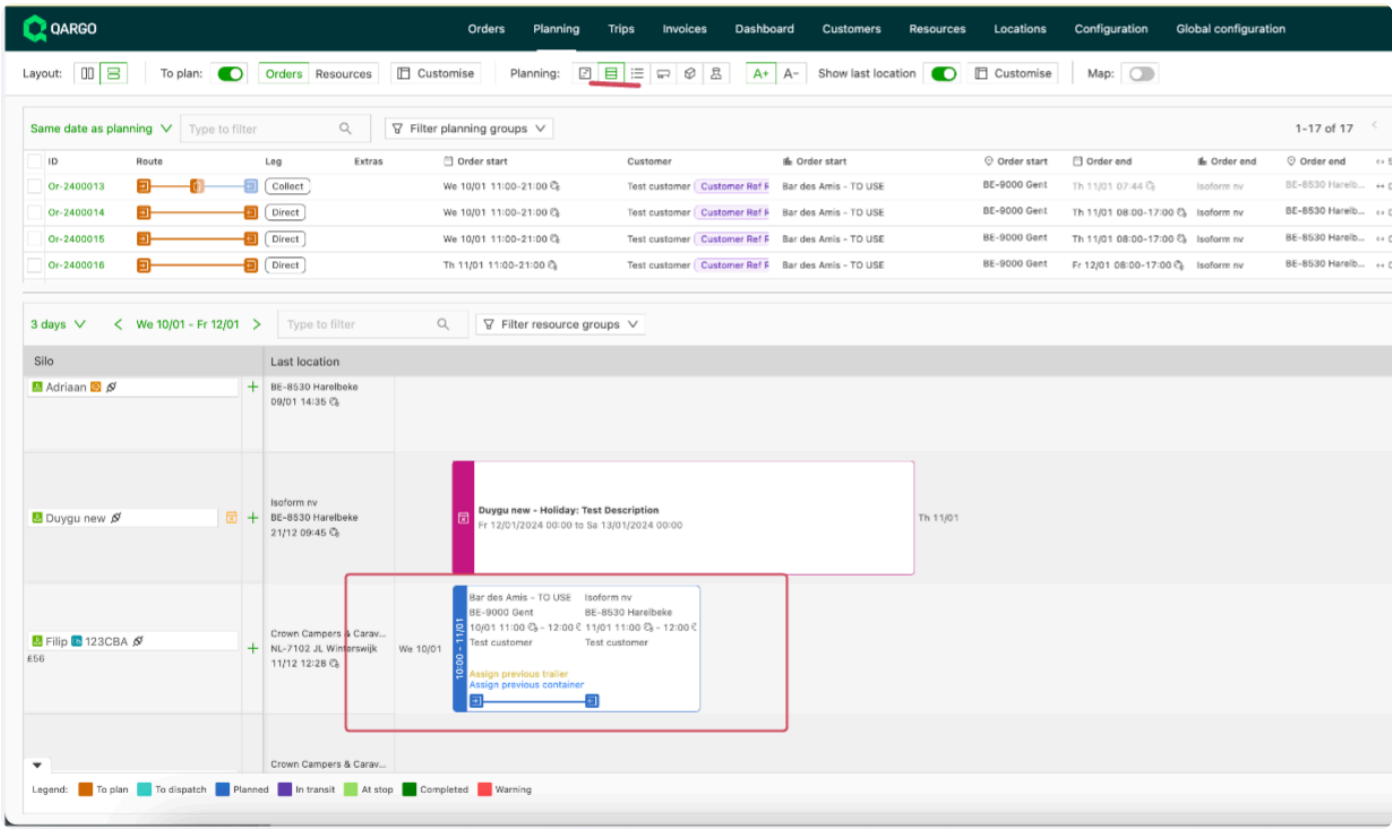
Assign resources to an order

Resources can be assigned directly from an order without going to the planning board.

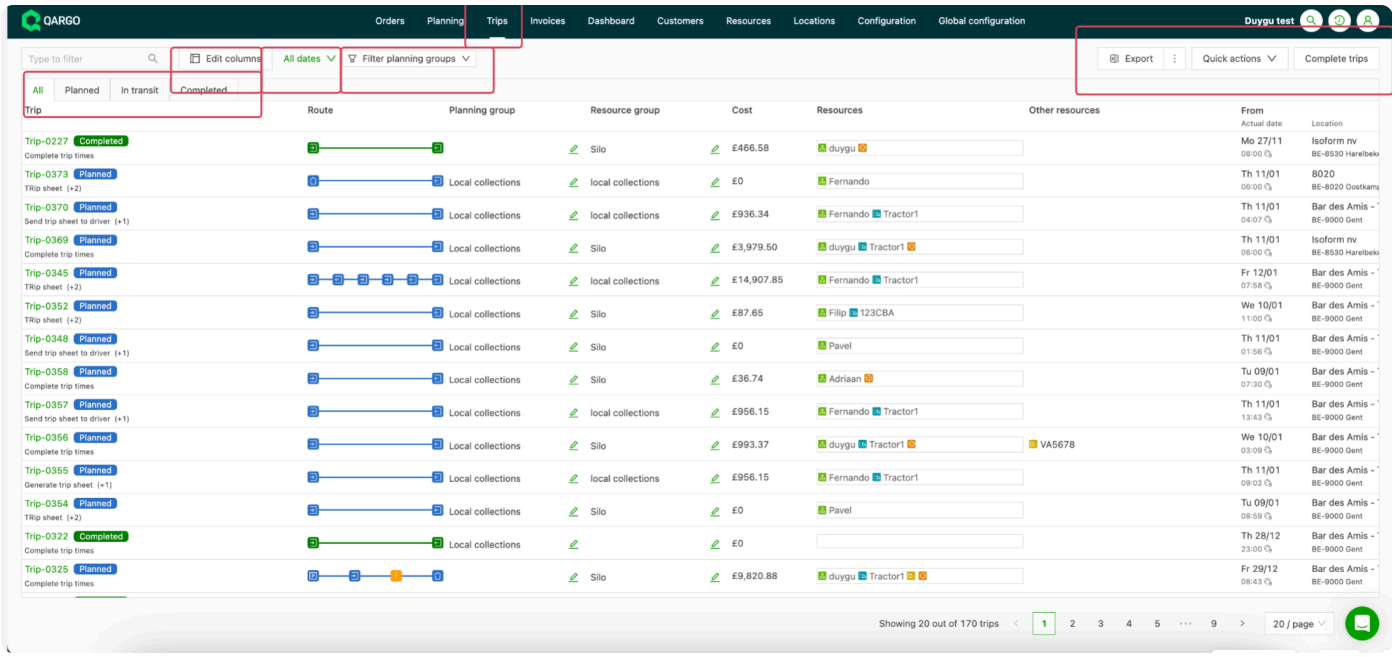
1. **Open** the order.
2. **Select** the resource fields (driver, vehicle, trailer, container) in the order detail panel.
3. **Assign** the relevant resources.
4. **Navigate** to the planning board to view the planned load on the resource line.


Detail view
Or-2400024
To plan
History
Customer: Test customer
Customer Ref Req.
Order creation date: Tu 09/01/2024
Transport service: Groupage
Responsible: duygu@qargo.io
Delivery
Isoform nv, Vaarnewijkstraat 12, BE-8530 Harelbeke
11/01 08:00-17:00
Cargo
CMR Reference
Consignment reference
Shipper name (Qargo network)
Shipper reference (Qargo network)
Notitie voor planner
Create CMR
CLICK
Execution
Trailer/container
Bar des Amis - TO USE → Isoform nv
Direct
To plan
No resources
Local collections
Show route
Complete trip times
Bar des Amis - TO USE
BE-9000 Gent
10/01 11:00-21:00
Test customer
Isoform nv
BE-8530 Harelbeke
11/01 08:00-17:00
Test customer
Revenue / cost calculation
Expand costs
Adapt revenue split
Leg
Revenue assigned
Costs from trip
Direct
£56
£0
Total
£56
£0


Assign resources
Trip-0352
BE-9000 Gent → BE-8530 Harelbeke
Resources
Subcontractors
Current selection
We 10/01
Th 11/01
Filip 123CBA
Resources
Type to filter
Combinations (6)
duygu Tractor1
BE-9000 Gent
BE-8530 Harelbeke
Filip 123CBA
Tractor2
Evolution Connection 34AB365
James Truck10
Test Tanks EVO
Cancel
Assign resources
Assign resources + add costs



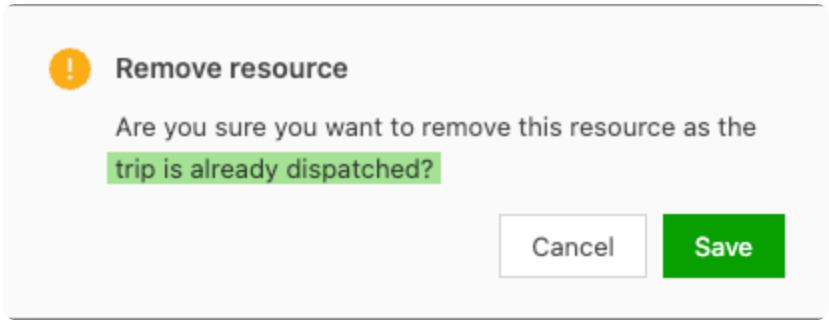
- All planned loads are also visible in the *Loads* list view, where columns can be customized and data can be exported.

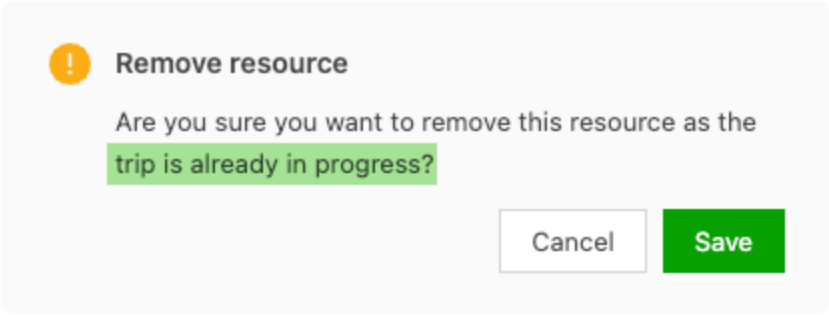


Warning when removing resources

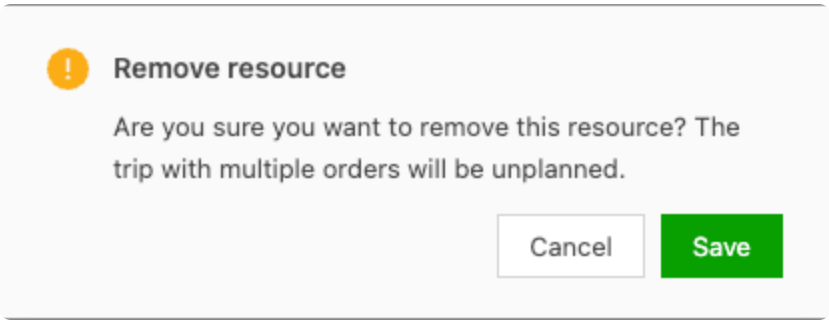
When a resource is removed from a load, a warning appears if:

- The load is already dispatched.





- There are multiple orders on the load.



Sort loads on the planning board

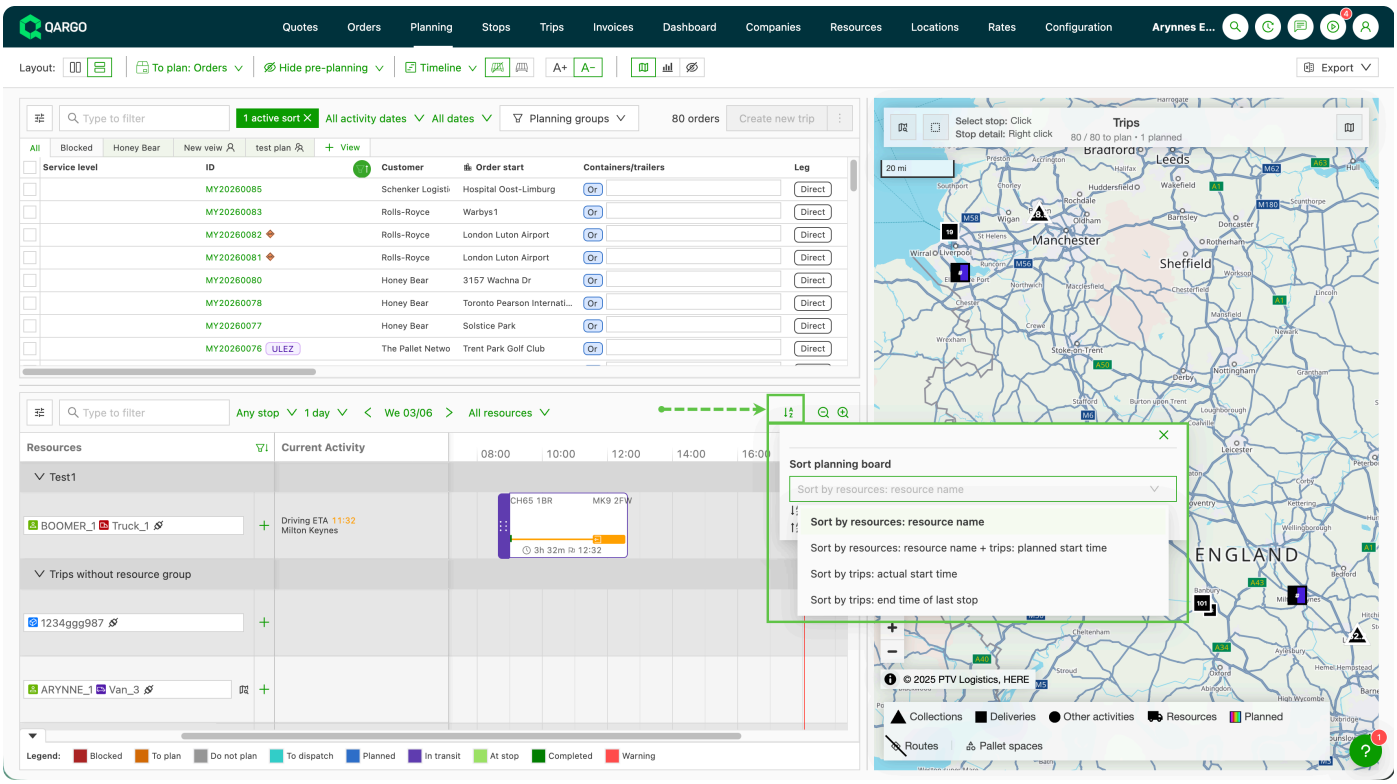
A sort option keeps loads in their originally planned position on a resource's row. This way, loads do not jump around when actual operations times differ from planned times.

Why this matters: When loads reorder automatically based on actual start times, a load that has not been completed yet can appear to have moved forward. Planners may then assume it is already done. Keeping loads in their planned position prevents this confusion.

Steps to apply the sort

1. **Open** the planning board.
2. **Click** the sort menu in the toolbar.
3. **Select** *Sort by resource: resource name + loads: planned start time* under the load sort options.

- Loads inside each resource row now stay in their planned order, even when actual start times differ.
- The default remains *Sort by actual start time* and can be changed at any time.



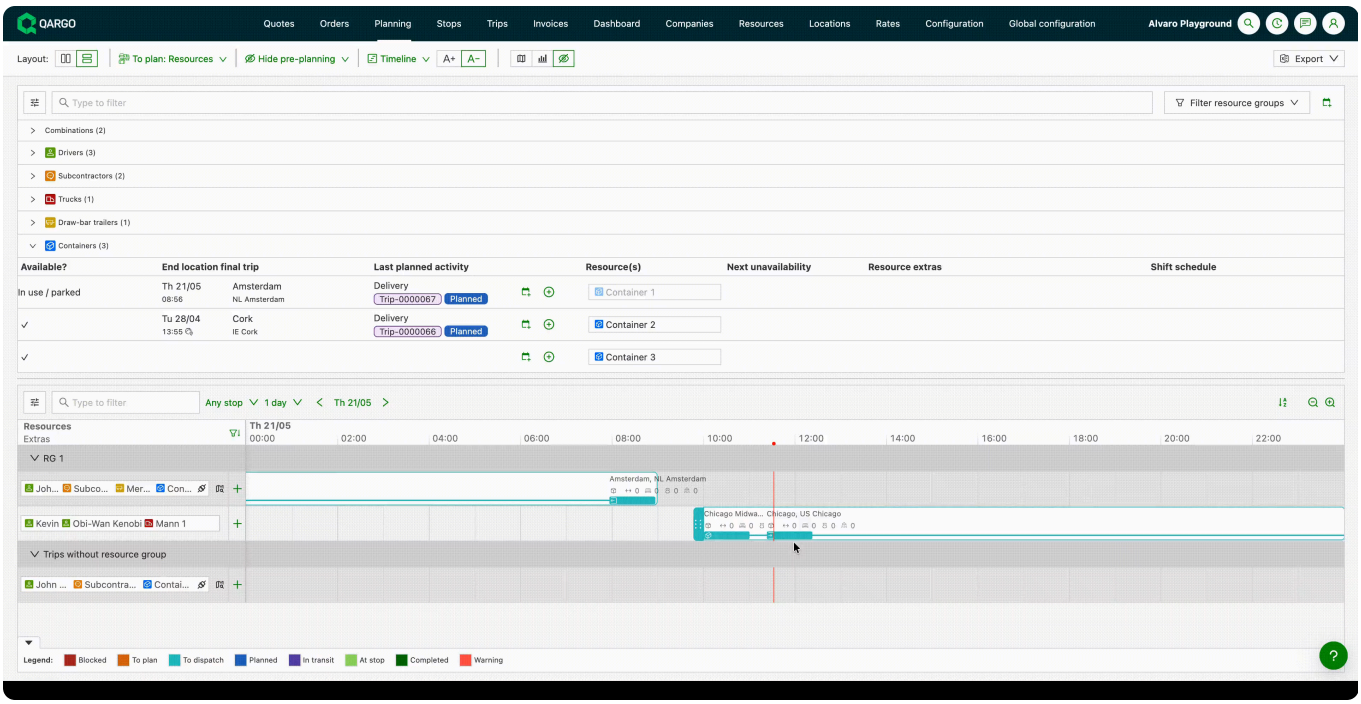
📚 This sort applies per resource line and works in both the *timeline* and *blocks* views.

- Resources themselves stay sorted by the existing resource-level sort logic.
- Sorting by *End time set by planner* is not available yet.

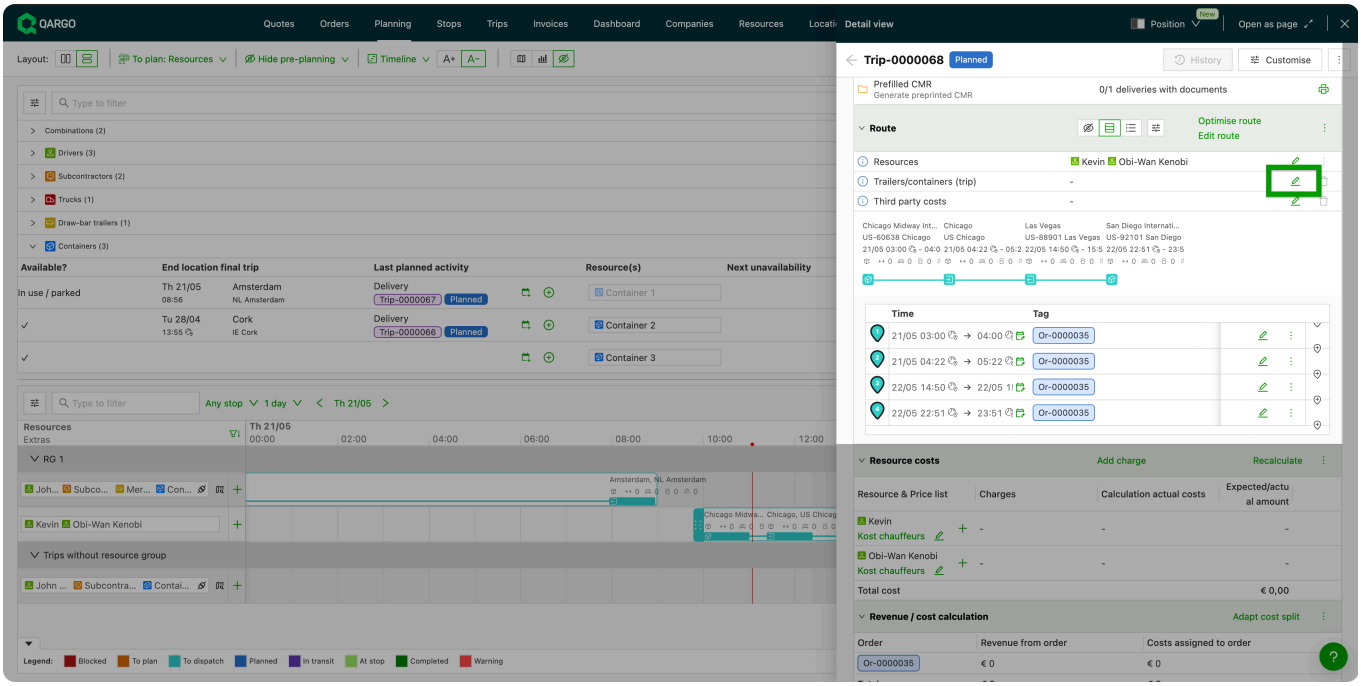
Assign a trailer, container, or chassis to specific stops

Trailers, containers, chassis, and third-party costs can be assigned to cover specific stops on a load, instead of the full load by default. This applies only to trailers, containers, chassis, and third-party costs. General resources such as drivers and trucks are not affected.
There are three ways to open the assignment window:

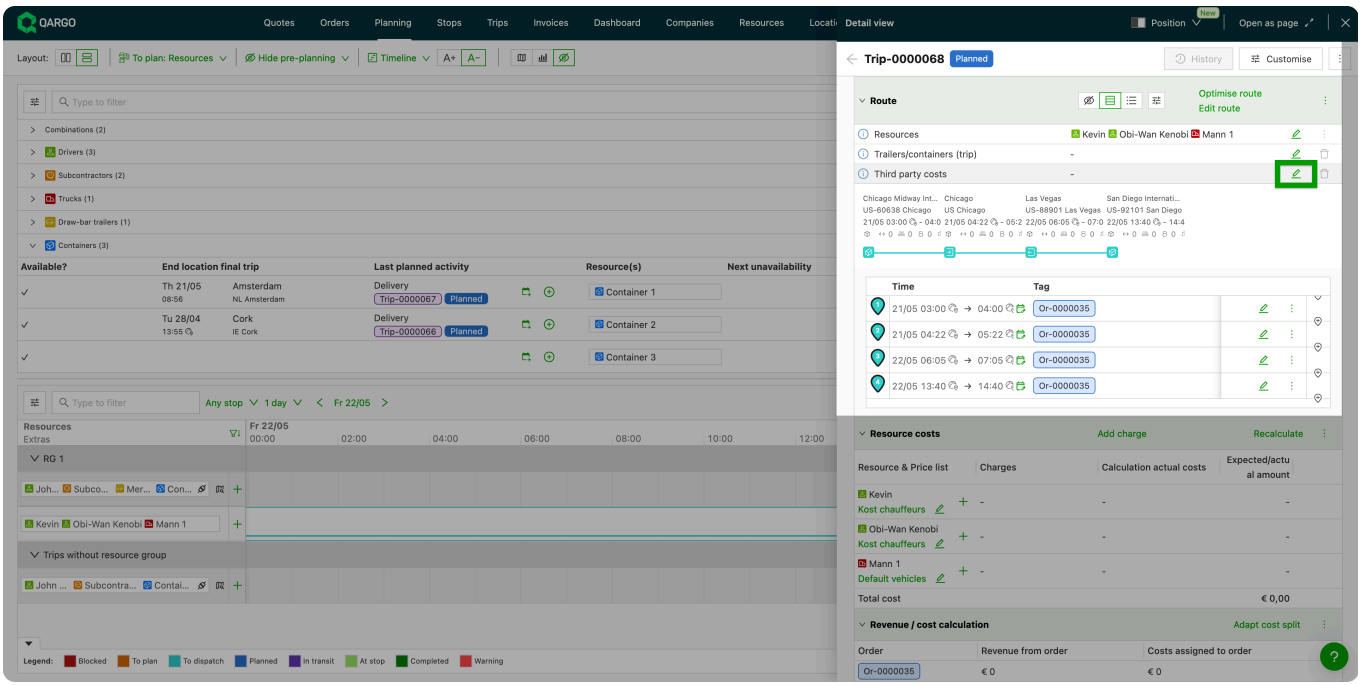
1. **Drag** a trailer, container, or chassis from the resources panel onto a load on the planning board.



2. **Click** the edit icon next to *Trailers/containers (load)* in the Route section of the load detail.



3. **Use** the *Third-party costs* section in the Route section of the load detail.



Set the start location

Use the *Start location* dropdown to choose where the assignment begins:

- *Start load* (default): assigned from the load's first stop.
- *Select stop on load*: choose an existing stop as the starting point.
- *Add new start stop to load*: adds a new stop. Fill in *Stop action*, *Duration*, and *Location* to define it.

Set the end location

Use the *End location* dropdown to choose where the assignment ends. The options work the same way:

- *End load* (default): assigned until the load's last stop.
- *Select stop on load*: choose an existing stop as the end point.
- *Add new end stop to load*: adds a new stop using the same inline fields.

> 📚 For third-party costs, setting the same stop for both *Start location* and *End location* assigns the cost to that single stop only.

Troubleshooting

Issue	Solution
Load moved unexpectedly on the planning board	Switch to *Sort by resource: resource name + loads: planned start time* to keep loads in their planned positions.
Warning shown when removing a resource	Check whether the load is dispatched or has multiple orders. Confirm the removal only if it is intended.
Trailer/container covers the full load instead of specific stops	Use the edit icon next to *Trailers/containers (load)* to set specific start and end stops.

Show final location in the Planboard location column

The Planboard location column can now show a driver's final planned location for the selected day. Planners can then plan follow-up work from where the driver will actually finish.

Use cases

- Planners who open the day's board first thing in the morning want to see where each driver will end up once the planned loads are taken into account, not only the current activity or last known location.
- When a driver has no load planned for the selected day, the column falls back to the last known location instead of staying blank. The driver's position is always visible.

What the location column shows

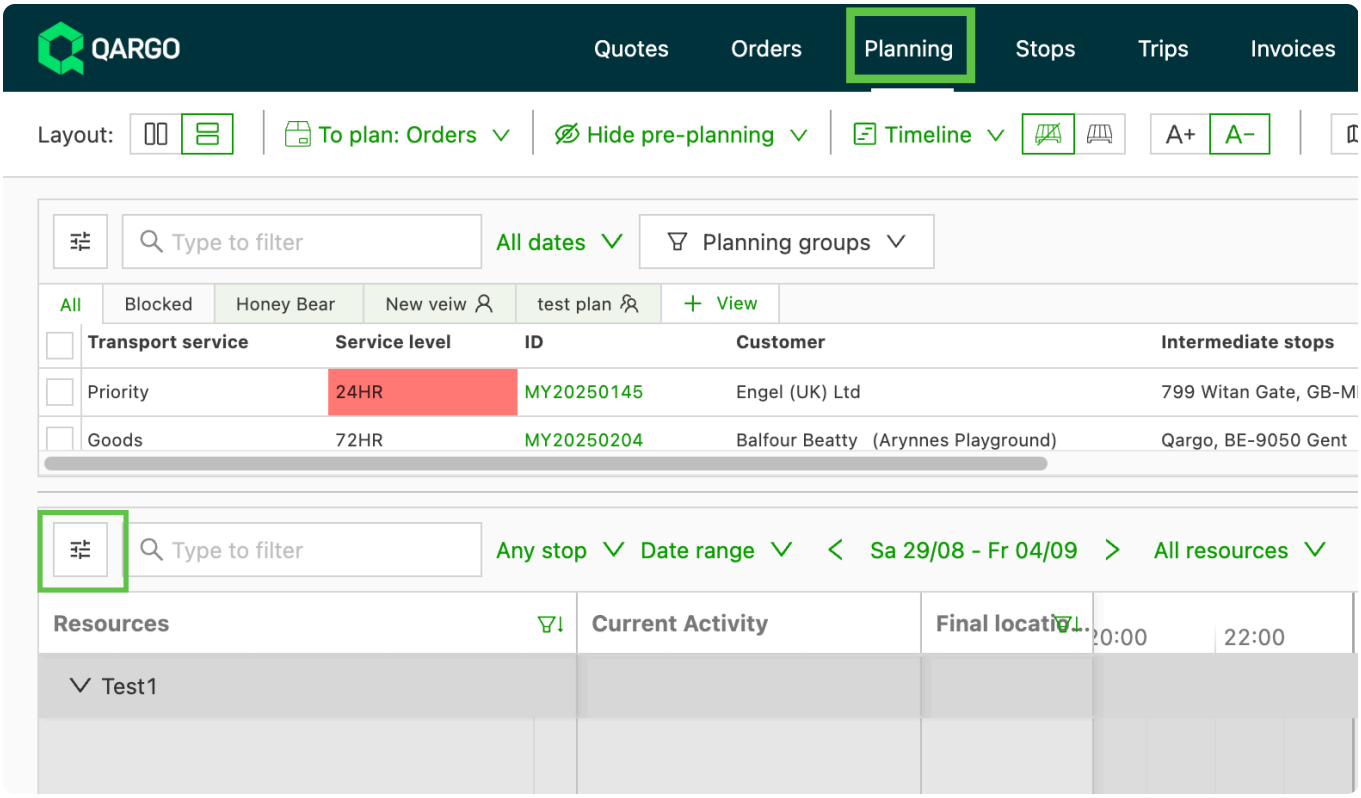
The location column has two modes, selected per user in the Planboard customization panel:

- **Show last location / current activity**: the existing behavior. It shows the current activity for today and the last known location for future dates.
- **Show final location**: the new mode. It shows where the driver ends up on the selected day, taking the planned loads into account. If a load is planned in the selected period, the column shows the final planned location of those loads. If nothing is planned, it falls back to the last known location from before the period.

The column header also shows the date the location refers to (for example, before 3/17 or incl 3/18). Planners can see at a glance which day the displayed location applies to.

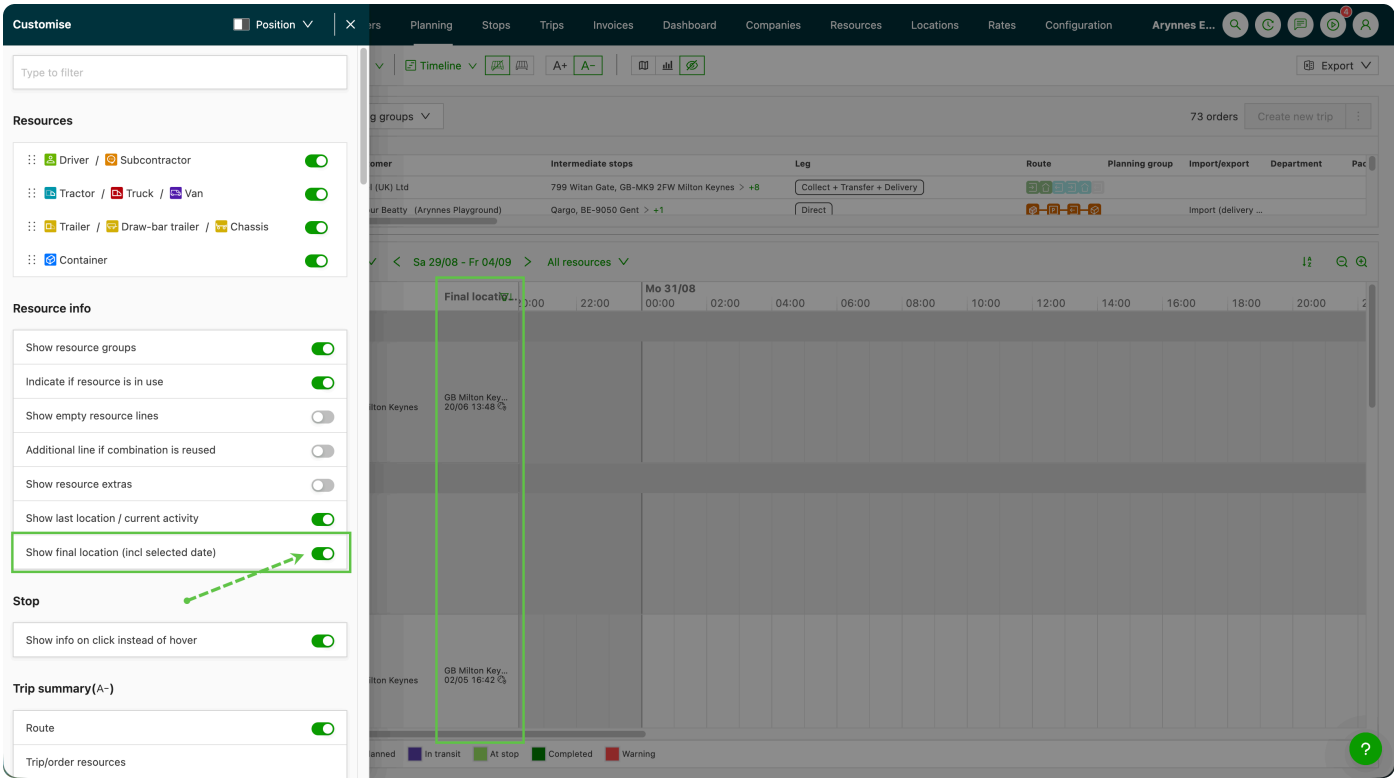
Set the location column mode

1. **Navigate** to the Planboard under Planning.
2. **Open** the customization panel with the **Customize** icon in the resources view, then go to **Resource info**.



3. **Select** the location column mode from the dropdown: **Show last location / current activity** or **Show final location**.
4. **Review** the location column and its header on the Planboard to confirm the selected mode and the date the location refers to.

The selected mode is saved per user, so each planner keeps their own preference.



📚 The mode is a per-user setting, so there is no tenant-wide default. Each planner picks their own mode.

Troubleshooting

Issue	Resolution
The location column is blank in *Show final location* mode	No load is planned in the selected period and no last known location is available before it. Check that the driver has a planned load or a recorded previous location.
The mode change is not visible in other views	The mode applies only to the Planboard resources view. The location displays in the shipment list and timeline are unchanged.

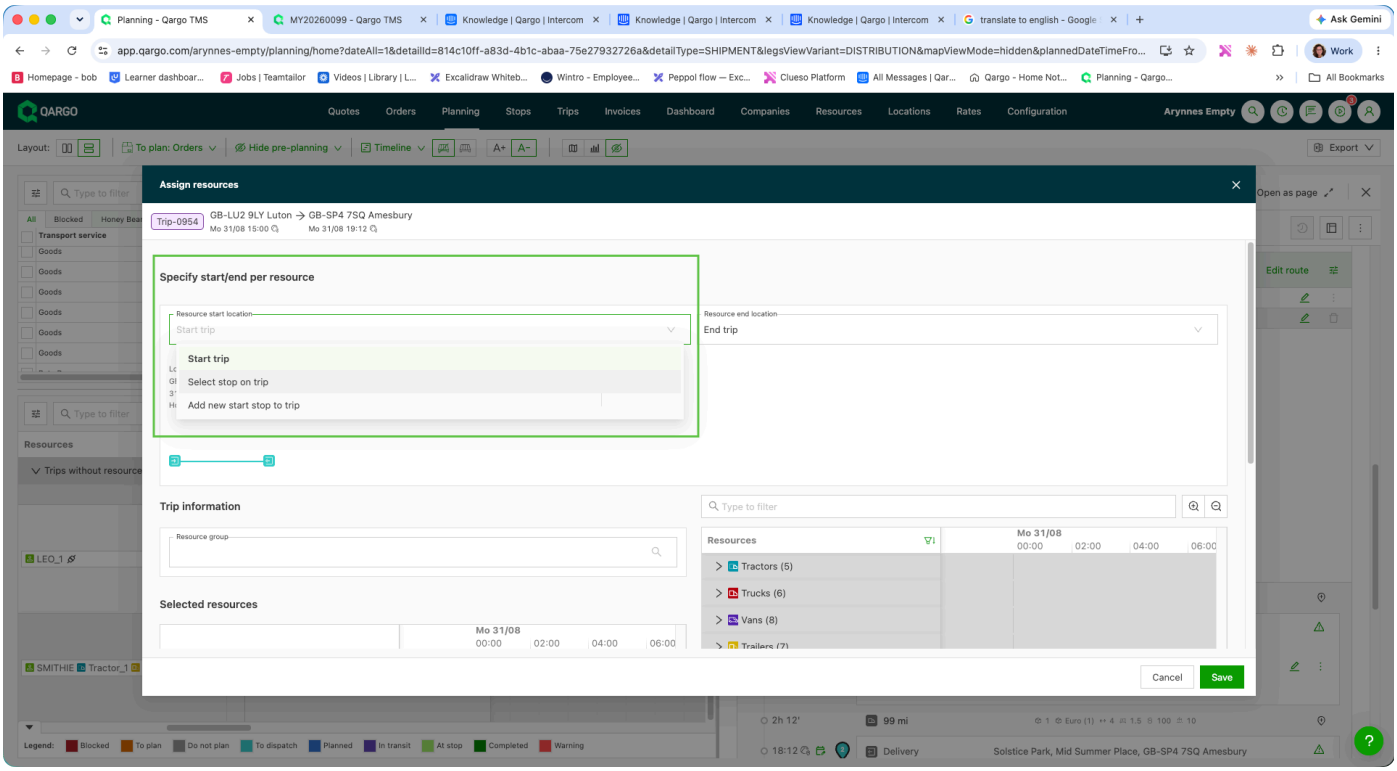
Auto-filled pickup location when adding a start stop

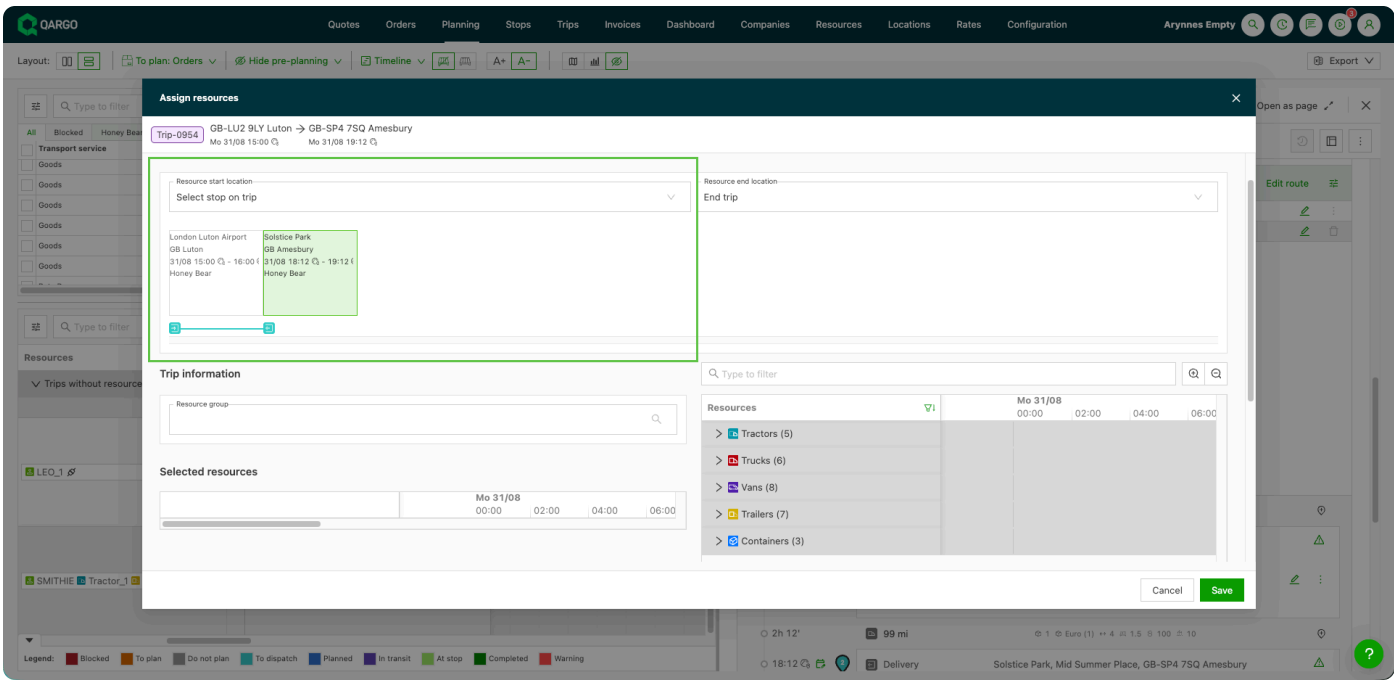
When an owned container or trailer is added in the **Assign resources** window, **Qargo now fills in the pickup location**: the place where that container or trailer was last dropped off. Users no longer have to look it up and type the address. The location appears as soon as the user picks the container or trailer, and it can always be changed, for example if the container needs to go to cleaning first. Users still choose where it is going, because that is usually the loading address.

Auto-fill in the load-level Assign resources window

Resource start location offers **Start load, Select stop on load, and Add new start stop** to load.

1. **Open** the Assign resources window on the load.
2. **Select** Add new start stop to load in the Resource start location dropdown. The stop form opens with Location still empty.
3. **Select** the container or trailer in the Resources list on the right. Qargo fills in Location with that resource's last drop-off location.
4. **Check** Activity, which defaults to Hook empty trailer, then **confirm** the proposed Location, or change it if the resource needs to go somewhere else first, for example to cleaning.
5. **Save** the window.

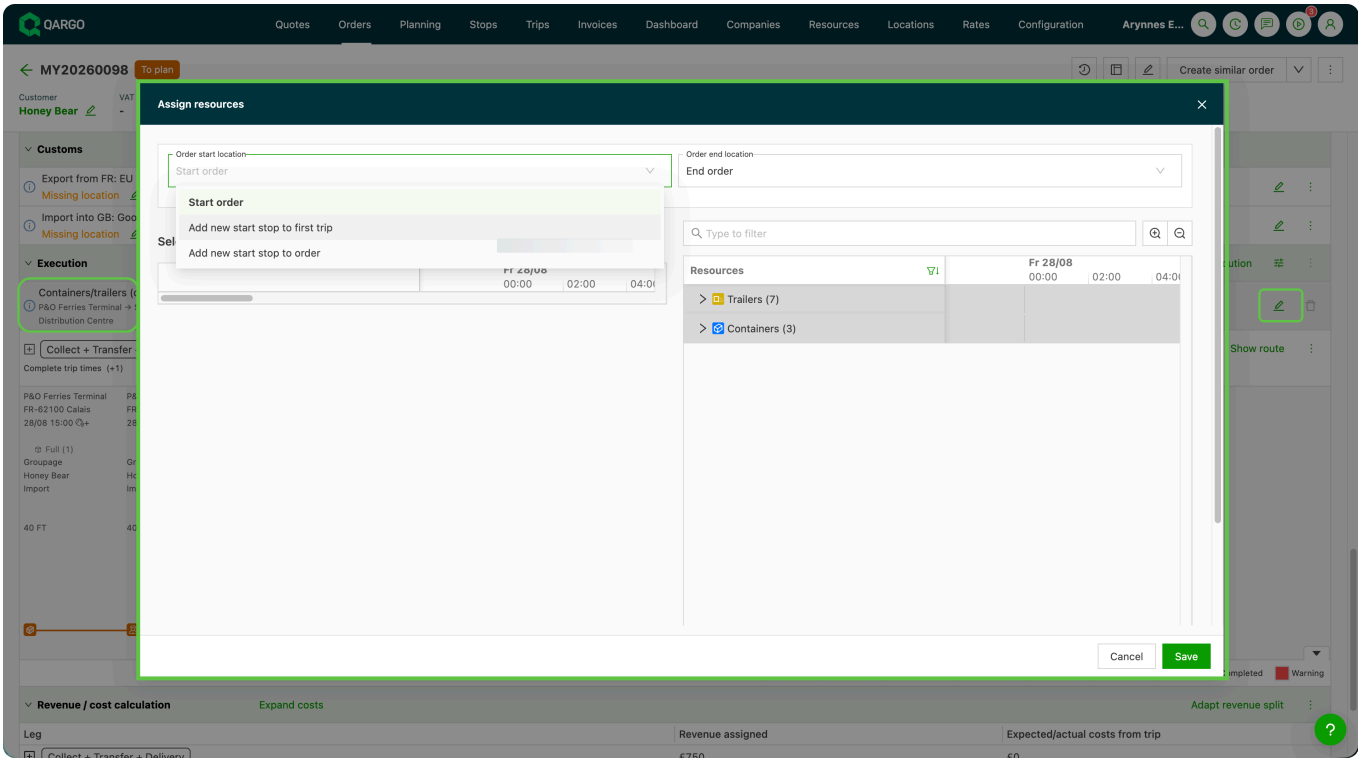




Auto-fill in the order-level Assign resources window

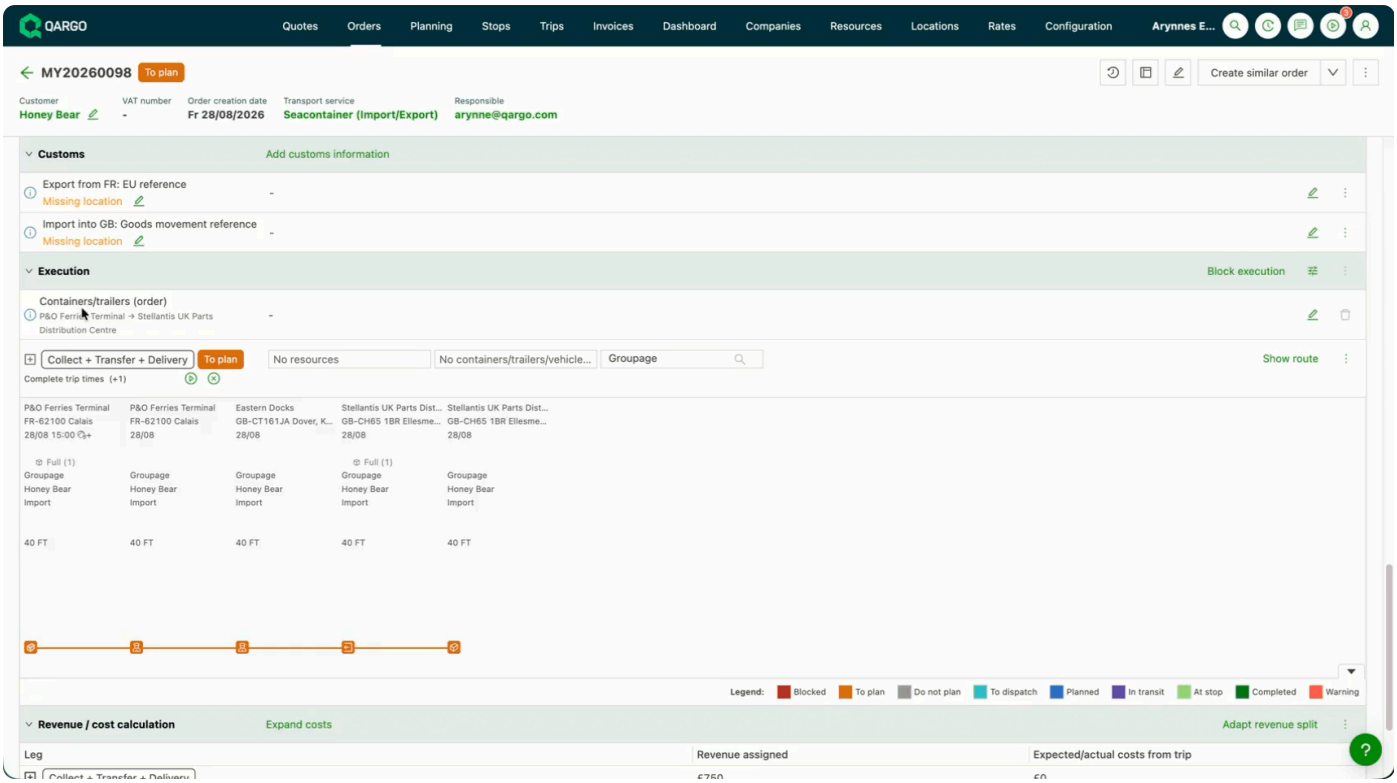
The order-level Assign resources window now includes Order start location and Order end location dropdowns, alongside the equivalent dropdowns in the load-level window. The options differ slightly, because an order can contain more than one load.

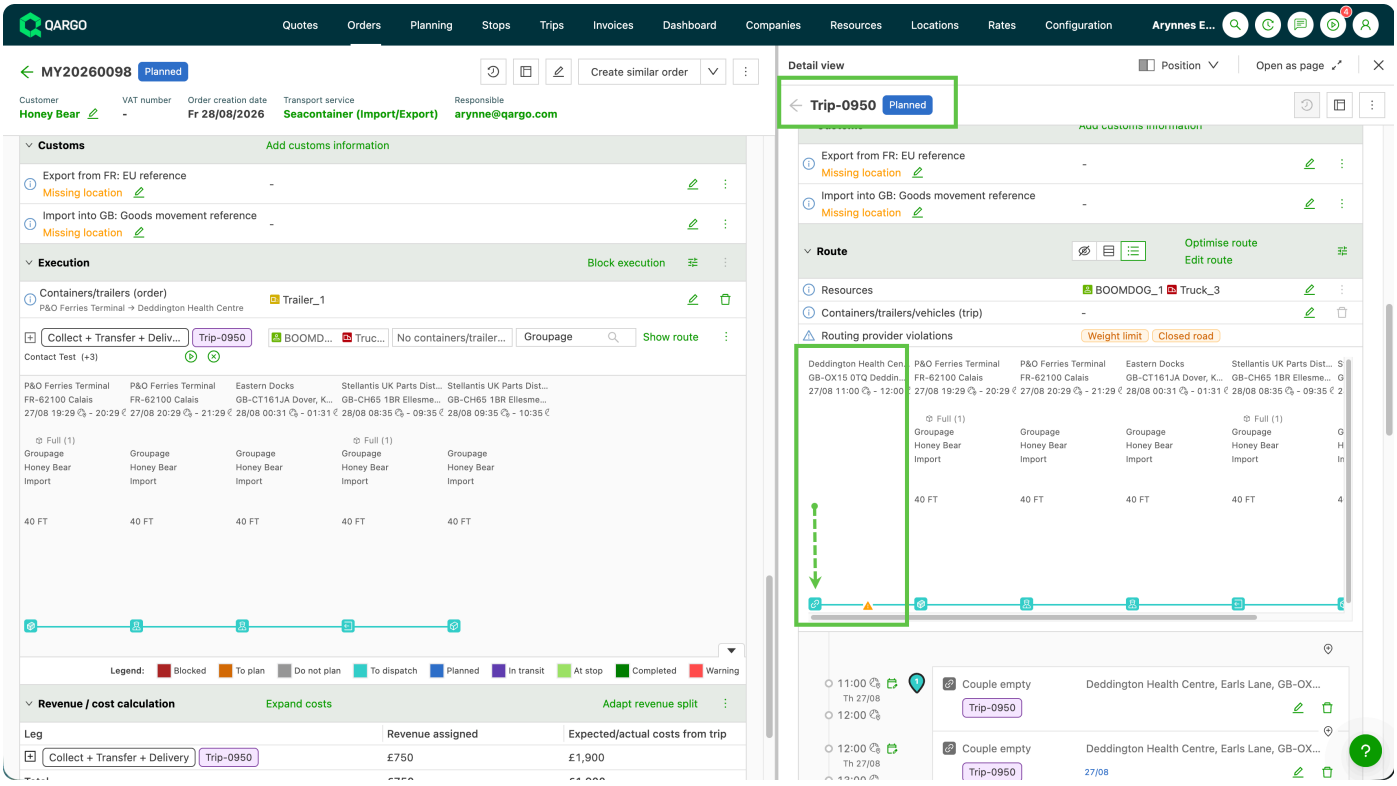
- Order start location offers ***Start order, Add new start stop to first load, and Add new start stop to order.***
- Order end location offers ***End order, Add new end stop to last load, and Add new end stop to order.***



1. **Open** the Assign resources window on the order.

2. **Select** Add new start stop to order in the Order start location dropdown. This adds the **pickup stop** to the start of the order's first load. The stop form opens with Location still empty.
3. **Select** the container or trailer in the Resources list. Qargo fills in Location with that resource's last drop-off location.
4. **Check** Activity, then **confirm** the proposed Location, or override it as needed.
5. **Save** the window.





📚 The pickup location is proposed when the stop is added. It is not synced again automatically if the container is later swapped for one stored at a different terminal.
There is nothing to configure. The proposed location comes from the resource's last drop-off, the same source already used when a container or trailer is assigned directly on a load.