PLANNING - Custom planboard layouts

The Planboard can now be arranged into 1 to 4 blocks, each showing a chosen planning component. Layouts are saved per user, named, and switched from the toolbar.

Updated October 1, 2026

Summary

What is it?

- A **Customize layout option** on the Planning board that replaces the single fixed arrangement with a configurable grid of 1 to 4 blocks.
- Each block displays one planning component — a to-plan list, the planning board, pre-planning, the map, statistics, or a resource view.
- Configured layouts are saved under a name and switched from the Planboard toolbar.

Why does it matter?

- Planning teams work in different ways. Some plan primarily from the map, others from the timeline, others from the to-plan list. A single fixed arrangement cannot suit all of them.
- Distribution, groupage and LTL operations running 30–50+ vehicles need maximum overview on screen. Large and multi-monitor setups previously gained no benefit from the extra space.
- Combinations that were previously mutually exclusive are now possible — for example *To plan: Orders* next to *To plan: Loads*, or the map without the planning board.

How does it work?

- **Click *'Add a custom layout'*** in the Planboard toolbar to open the layout builder.
- **Choose** the number of blocks, the grid arrangement, and the content of each block.
- **Apply** the layout, then save it under a name to reuse and switch between layouts later.
- Layout choices are stored per user and are restored automatically on the next visit to Planning.

Terminology

Term	Definition
Block	One area of the Planning board grid. Each block displays a single planning component.
Layout variant	The grid arrangement used for a given number of blocks, such as *Stacked*, *Left + 2* or *2x2 grid*.
Content type	The component shown inside a block, such as *To plan: Orders*, *Planning board: Loads*, *Map* or *Statistics*.
View	The visualization used by a content type that supports more than one, such as *Timeline*, *Blocks* or *Table*.
Saved layout	A named configuration of blocks, variant and content, stored against the individual user account.
Default	The standard Planning board arrangement, controlled by the existing toolbar dropdowns.

Use cases

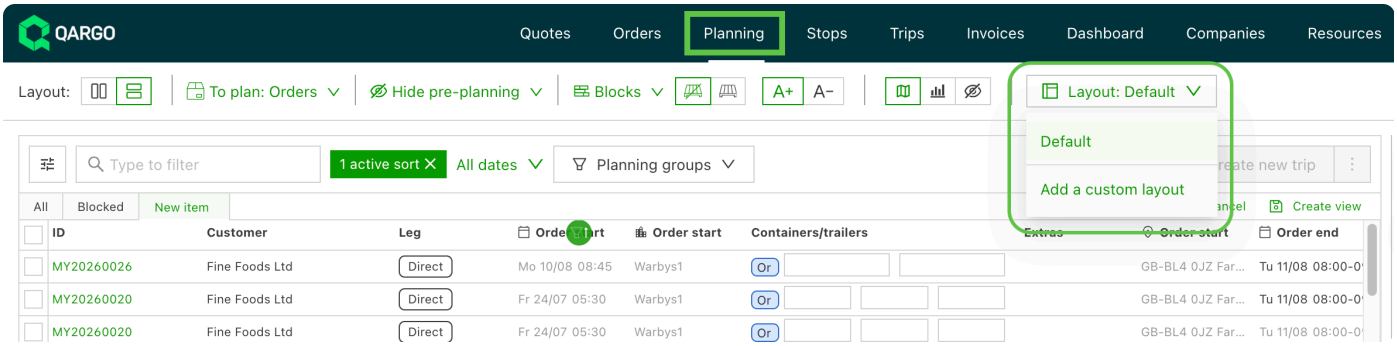
- **Distribution planning across many vehicles.** A four-block layout can combine the planning board timeline, the to-plan orders list, the map and a load overview, giving a full picture on a single large screen instead of switching between panels.
- **Multi-screen planning desks.** Teams running two or three monitors can keep a wide layout open on the main screen and a second, narrower layout for monitoring.
- **Map-led planning.** A two-block *Side by side* layout with the map alongside *To plan: Orders* suits planners who work geographically, without the planning board taking up space.
- **Order and load planning together.** *To plan: Orders* and *To plan: Loads* can now be displayed at the same time, which was not possible with the previous fixed arrangement.
- **Task-specific layouts.** Separate saved layouts for morning planning, intermodal work and end-of-day monitoring remove the need to re-toggle the same set of panels each time.

🎥 Video walkthrough

▶ https://watchclueso.com/embed/n96tpfvrhpx9hy0r

Use the layout builder

1. **Navigate** to **Planning**
2. **Click *'Layout: Default'*** dropdown
3. **Select *'Add a custom layout'***



The Customize layout modal opens pre-filled with the arrangement currently on screen, so **an existing setup can be adjusted** rather than rebuilt from scratch.

Build a layout

Choose the number of blocks

Select between 1 and 4 blocks. Every block must contain a component — an empty block is not a valid configuration.

Choose the grid variant

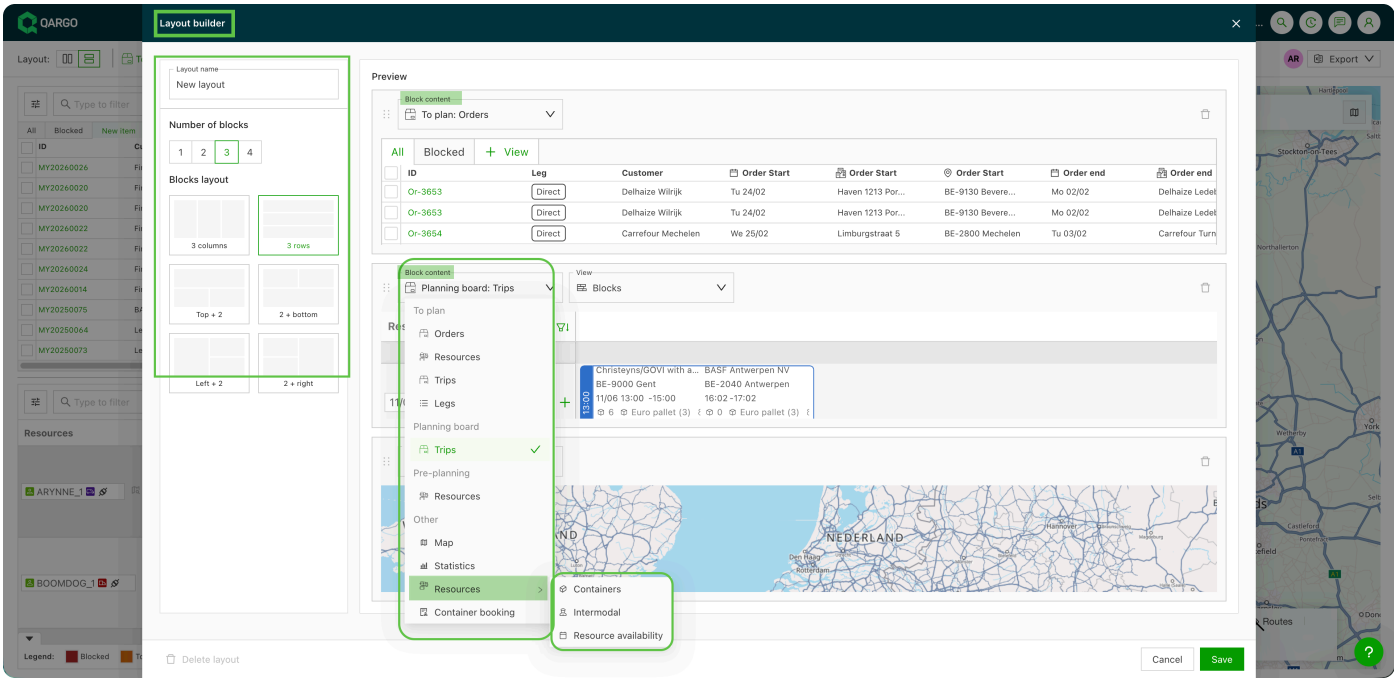
Each block count offers a set of predefined grid arrangements, shown as visual thumbnails.

Blocks	Available variants	Default
1	*Full*	*Full*
2	*Side by side*, *Stacked*	*Stacked*
3	*3 columns*, *3 rows*, *Left + 2*, *2 + right*, *2 + bottom*, *Top + 2*	*2 + right*
4	*2x2 grid*, *4 columns*, *4 rows*, *Top + 3*, *Wide + 3*, *3 + Bottom*	*2x2 grid*

Choose the content of each block

Every block has a content dropdown. The options mirror the components already available on the Planning page:

- **To plan:** *Orders*, *Resources*, *Loads*, *Legs*
- **Planning board:** *Loads*
- **Pre-planning:** *Pre-planning resource*
- **Resources:** *Containers*, *Intermodal*, *Resource availability*
- **Others:** *Map*, *Statistics*, *Container booking*

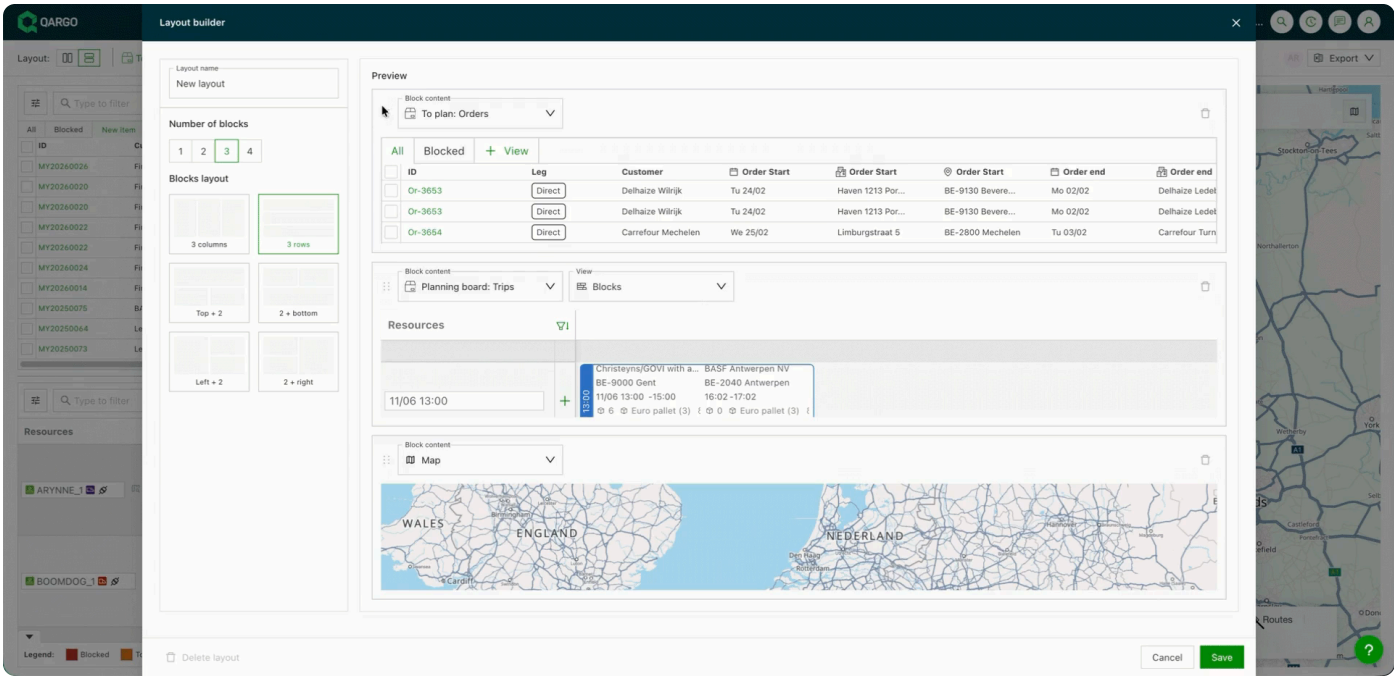


Content types that support more than one visualization show a second dropdown for the view:

Content type	Available views
To plan: Resources	*Timeline*, *Table*
Planning board: Loads	*Timeline*, *Blocks*, *Table*
Pre-planning resource	*Timeline*, *Table*

Rearrange and remove blocks

- **Drag** a block by the handle on its header to swap it with another block in the preview.
- **Click** the delete icon on a block to remove it. The block count on the left decreases accordingly.

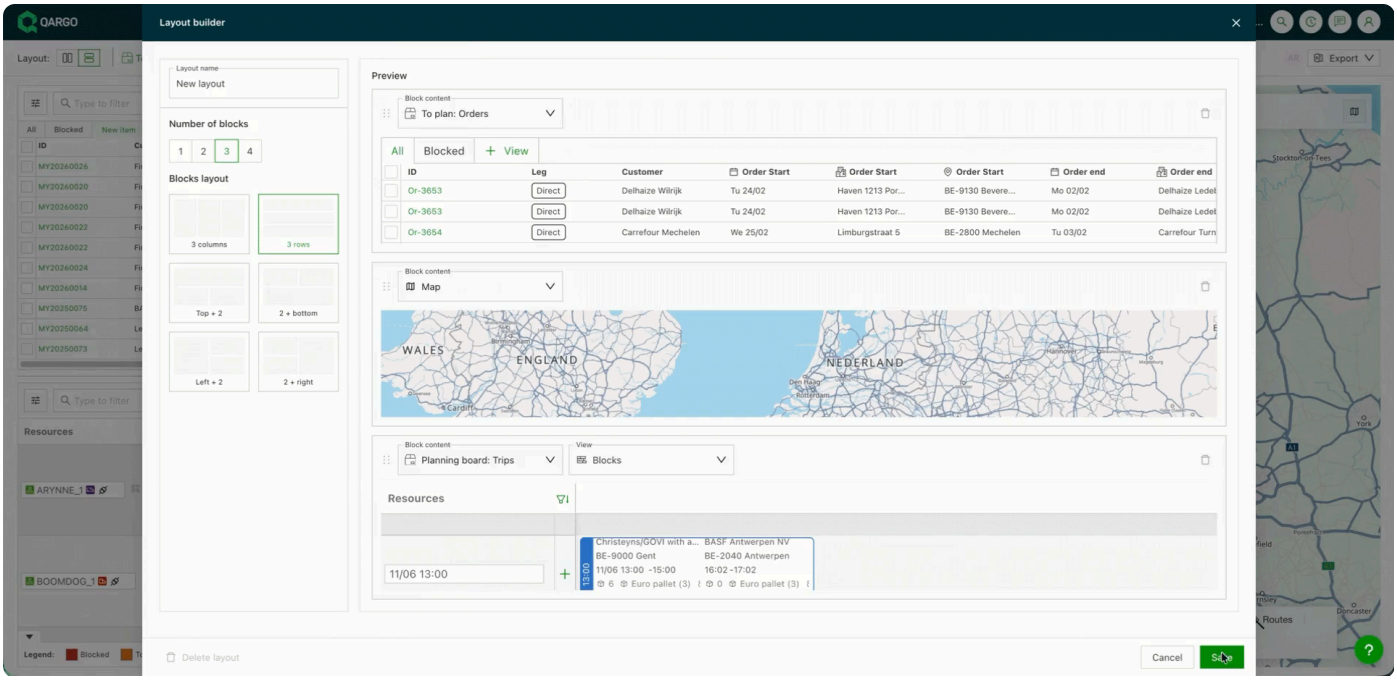


The previews inside the builder are static illustrations of each component, not live data.

Apply the layout

Click Save. The Planning board is reconfigured immediately.

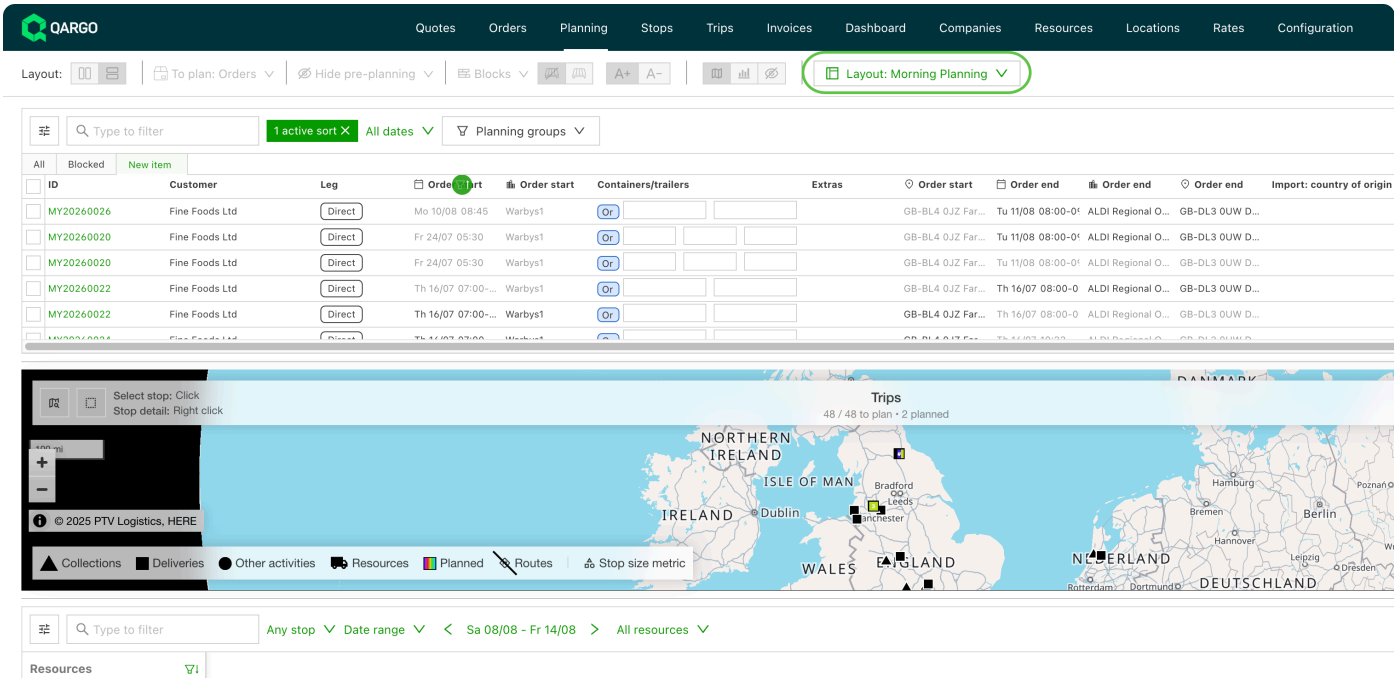
Once applied, the divider between blocks can be dragged to resize them, in the same way as on the standard Planning board.



Save, switch and manage layouts

Save a layout

A configured layout is **saved** under a name. Saved layouts appear in the layout selector in the Planboard toolbar, which then displays ***'Layout: <layout name>'***.



A layout cannot be saved if two blocks contain exactly the same content. Duplicate content is allowed while arranging blocks in the preview — so two blocks can be swapped — but the layout must contain distinct components before it can be saved.

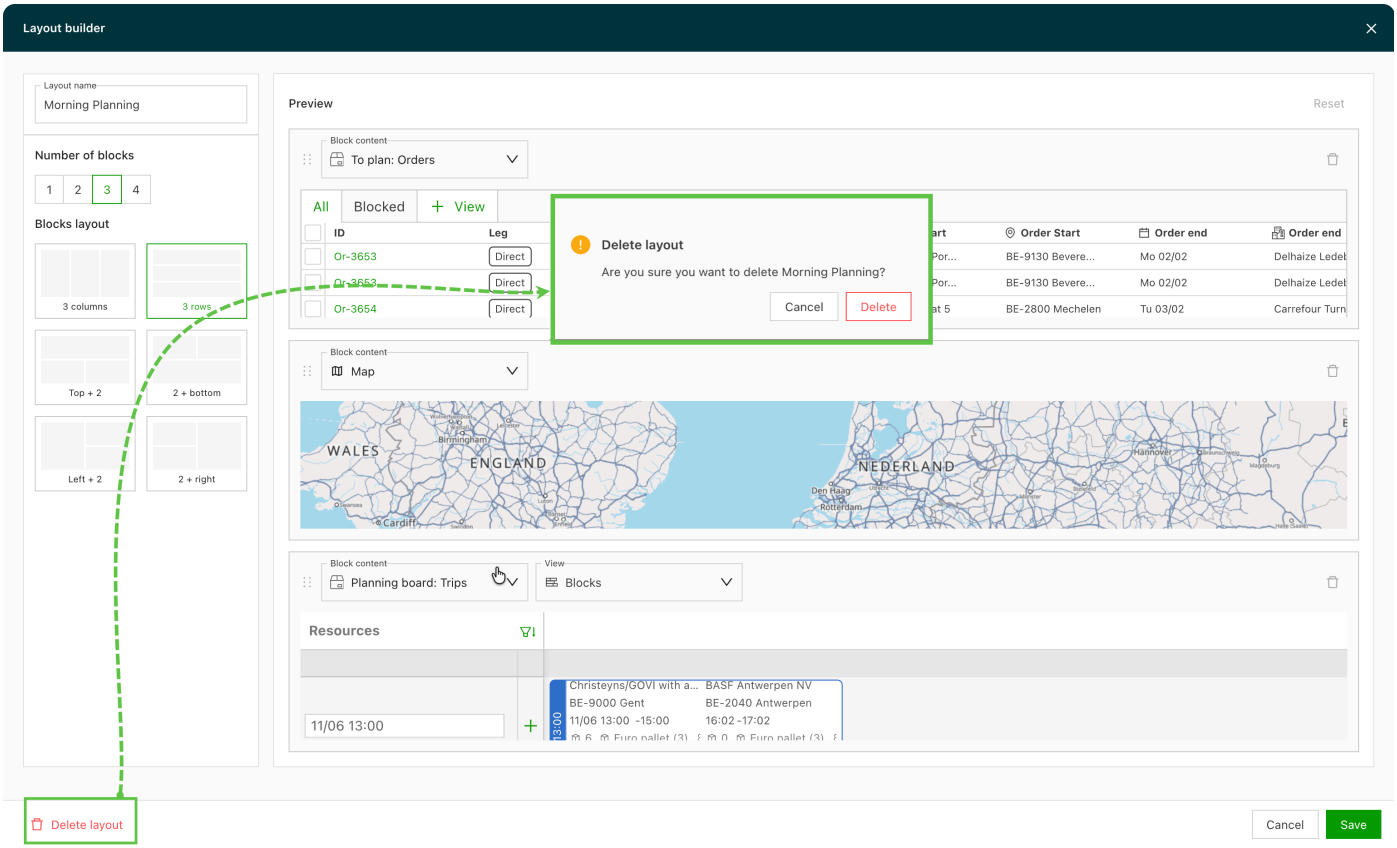
Switch between layouts

Select a saved layout from the toolbar selector at any time. A planner can keep one layout for morning planning and another for monitoring during the day, and move between them as the shift progresses.

The selector also contains a Default entry, which returns the Planning board to the **standard arrangement controlled by the toolbar dropdowns**.

Edit or delete a layout

Saved layouts can be edited or deleted from the same selector. Deleting a layout opens a confirmation before it is removed.



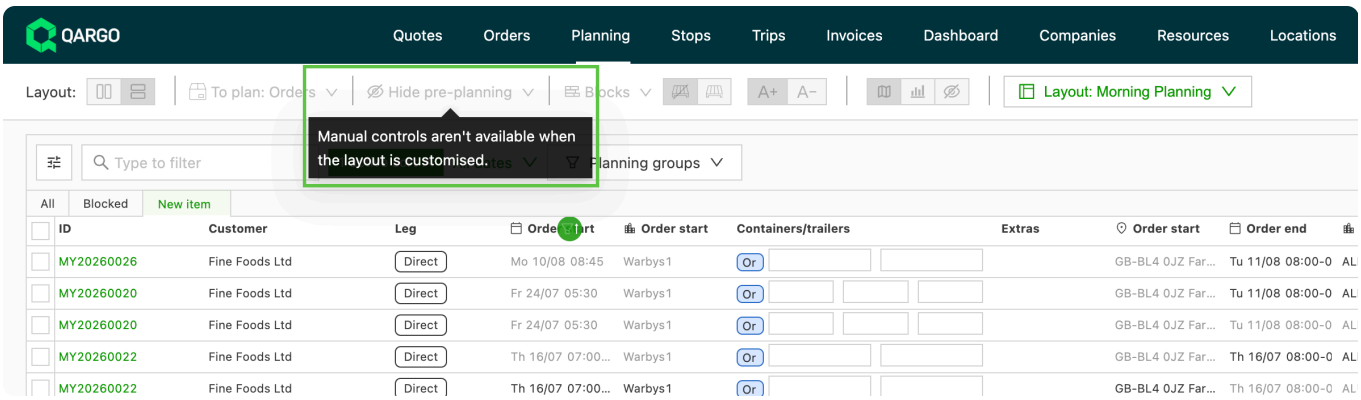
How layouts are stored

- Layouts are saved **per user**.
- They persist across sessions and follow the user across their Planning tabs.
- The last layout used is restored automatically when Planning is opened again.

Default layout and the existing toolbar dropdowns

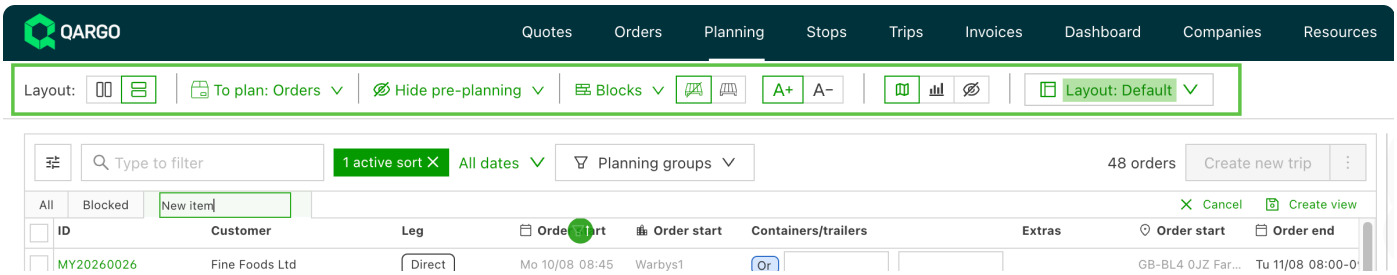
> 📚 **The existing toolbar dropdowns and controls remain available.**

- While the layout is set to Default, the toolbar dropdowns behave exactly as before.
- While a custom layout is active, the dropdowns and controls are disabled and show a tooltip explaining that they cannot be used with a custom layout. The layout itself determines what is displayed.

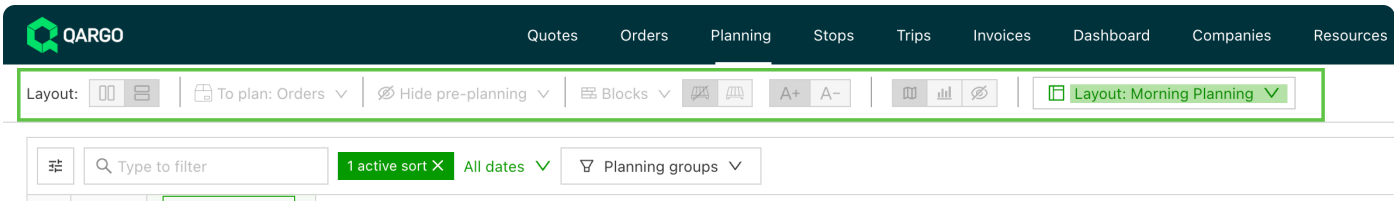


- To return to dropdown-driven control, **select** Default in the layout selector.

Default:



Custom layout:



📚 See PLANNING - Planning views options for the current dropdown behavior.

Good to know

Limitation	Detail
No predefined layout presets	Every layout is composed manually in this version.
Combined blocks	The Legs view (to-plan orders plus planned loads) and the Intermodal view (departures plus to-plan bookings) remain combined blocks and cannot be split into their sub-views.
To-plan lists not merged	*To plan: Orders* and the to-plan list of the distribution (Legs) view are separate and are not merged.
Drag and drop between blocks	Cross-block drag and drop keeps its current behavior. Some combinations, such as a timeline block next to a Legs view block, do not support dragging between blocks.

Troubleshooting

Issue	Resolution
The toolbar dropdowns are grayed out and cannot be changed	A custom layout is active. Panels are controlled by the layout itself. Select Default in the layout selector to re-enable the dropdowns.
A layout cannot be saved	Two blocks contain the same content. Change one of them so every block shows a different component, then save.
A block appears empty	Every block must contain a component. Select a content type for the block, or reduce the block count to remove it.
An order cannot be dragged from one block into another	Dragging between blocks works wherever it already worked between those two components — for example from *To plan: Orders* onto *Planning board: Loads*, or from *To plan: Resources* onto a load to assign a resource. Pairings that never supported it still do not, such as a *Planning board: Loads* timeline block next to a *To plan: Legs* block.\
Where a pairing is not supported, use a layout that combines components that already worked together.	
The layout is not the one last used	Layouts are stored per user. Check that the correct user account is signed in — layouts do not transfer between users.
A saved layout is missing	Deleting a layout is confirmed but permanent. The layout needs to be rebuilt and saved again.