

GATE PLANNING

User Guide

Date: 23. 03. 2025

Version: 1.0

Contents

Contents.....	1
Introduction.....	4
What is GATE PLANNING?.....	4
Key Benefits and Features.....	4
Faster Turnarounds, Less Chaos.....	4
Central Hub for All Shipments.....	5
Interactive Time Visualization.....	5
Real-Time Arrival Tracking.....	5
Custom Workflows & User Roles.....	5
Reusable Slot Templates.....	5
Automated Cutoff & Booking Rules.....	5
Carrier & Customer Access.....	5
Advanced Data Export & API Access.....	5
Getting Started.....	6
Logging In.....	6
Using Username and Password.....	6
Using Single Sign-On (SSO).....	6
Booking Management.....	7
Booking Lifecycle.....	7
Booking Statuses and Their Roles.....	7
Customizing the Booking Workflow.....	8
Bookings List.....	8
Filtering and Searching Bookings.....	8
Booking List Columns.....	9
Quick Actions in the Booking List.....	9
Exporting Booking Data.....	10
Schedule.....	11
Monthly View.....	11
Daily View.....	12
Adjusting Bookings in the Schedule.....	13
Slot Availability Rules.....	14
Quick Actions in the Booking List.....	15
Creating and Editing Bookings.....	15
Booking Status Transitions & Permissions.....	15
Booking Form Structure.....	16
Form Action Buttons.....	19
Canceling a Booking.....	19
Rebooking.....	19
Planning Templates.....	20
Overview of Planning Templates.....	20
Template List.....	20

Creating Templates.....	21
Defining Slot Rules.....	21
Slot Types & Restrictions.....	22
Bulk Editing Slots with Rule Range.....	23
Form Action Buttons.....	23
Applying Templates.....	23
Administration.....	24
User Management.....	24
Creating and Editing User Accounts.....	24
Assigning Roles to Users.....	25
Setting Notification Preferences.....	25
Roles & Permissions.....	25
Predefined User Roles.....	25
Configuring Permissions.....	26
Carriers.....	27
Managing Carrier Details.....	27
Customer Access Restrictions.....	27
Slot Visibility Permissions.....	28
Customers.....	28
Managing Customer Details.....	28
Carrier Access Restrictions.....	28
Slot Visibility Permissions.....	28
Configuration.....	29
General Settings.....	29
Cutoff Settings.....	29
Scheduling and Visibility Rules.....	29
Late Arrival & Processing Time.....	30
System Data Management.....	30
Processes.....	30
Views.....	31
Booking Fields.....	32
Booking Field Settings.....	32
Usage.....	32
Booking Flags.....	32
Common Use Cases.....	32
Reason Codes.....	33
Common Use Cases.....	33
Holidays.....	33
Internal Configuration.....	34
Slot preview customization.....	34
Time zone configuration.....	34
Optional feature toggles.....	34

System-defined lists.....	34
User Preferences.....	34
Deployment.....	35
API Access.....	36
Application API.....	36
Reporting API.....	36
Security & Access Control.....	36
Troubleshooting and Support.....	38
Common Issues and Solutions.....	38
Login Issues.....	38
Booking Status Not Updating.....	38
Template Application Errors.....	38
Slots Not Visible for Carriers.....	39
System Performance Issues.....	39
Contact Information for Support.....	39
Conclusion.....	40
Key Takeaways.....	40

Introduction

What is GATE PLANNING?

GATE PLANNING is a modern web-based application that helps warehouses manage **inbound and outbound traffic** with clarity and control. It combines **smart scheduling** tools with a centralized system for **tracking and recording all transport activity**.

The primary goal of GATE PLANNING is to streamline the coordination of shipments and provide full visibility into dock operations. By offering a clear, structured interface for managing bookings, the system reduces congestion, shortens wait times, and improves overall efficiency.

With GATE PLANNING, you can:

- **Manage bookings** from carriers or warehouse staff in a centralized system
- **Visualize daily capacity** and booking statuses through an interactive calendar and timeline
- **Customize slot availability** using reusable templates tailored to operational needs
- **Monitor arrivals and departures** using timestamped updates
- **Define processes** through configurable rules, roles, and permissions
- **Maintain full visibility** over warehouse activity and capacity utilization

Whether your warehouse handles a few or hundreds of shipments per day, GATE PLANNING offers scalable, role-based tools that support both planning and real-time coordination.

In short, GATE PLANNING helps you bring order, predictability, and transparency to every shipment — saving time, reducing errors, and improving communication across your logistics network.

Key Benefits and Features

GATE PLANNING simplifies complex dock scheduling through a clean, visual interface and smart automation. It adapts to the way your warehouse operates — whether you manage one site or a global network.

Faster Turnarounds, Less Chaos

Eliminate overlapping arrivals, idle ramps, and manual coordination. GATE PLANNING brings structure to your day, shortens truck waiting times, and helps your team move faster with fewer mistakes.

Central Hub for All Shipments

Track every change made to a booking — who did what and when. GATE PLANNING provides a centralized system where all information about inbound and outbound shipments is stored, timestamped, and fully traceable.

Interactive Time Visualization

Plan your day with confidence. A dynamic, color-coded daily timeline shows gate occupancy, shift schedules, and booking status at a glance. Drag & drop functionality and real-time updates make it easy to resolve conflicts and react to changes instantly.

Real-Time Arrival Tracking

Gain full visibility over each stage of the booking lifecycle — from Prebooked to Closed. Every transition is tracked with precise timestamps, helping you monitor delays, reduce no-shows, and improve turnaround time.

Custom Workflows & User Roles

Tailor GATE PLANNING to your internal processes. Define booking flows, permissions, and required fields based on user roles or booking status. Ensure everyone — from logistics managers to external carriers — interacts with the system the right way.

Reusable Slot Templates

Speed up planning with standardized templates for common shift patterns, transport types, or customer requirements. Templates ensure consistent setup and reduce manual errors across your operations.

Automated Cutoff & Booking Rules

Control bookings with precision. Define flexible cutoff times, set booking limits by carrier, customer or transport type, and automatically cancel unconfirmed reservations. This reduces scheduling errors and keeps your operation running smoothly.

Carrier & Customer Access

Enable controlled access for external partners. Carriers and customers can view and book only the time slots relevant to them, improving transparency and reducing the need for manual coordination.

Advanced Data Export & API Access

Export booking data with one click or connect external dashboards via the built-in API. Analyze slot usage, delays, and KPIs across sites — and make data-driven decisions to optimize your logistics performance.

Getting Started

Logging In

GATE PLANNING supports two secure methods of user authentication: traditional login with a username and password, and Single Sign-On (SSO) for organizations that have it enabled.

Using Username and Password

1. Open the **GATE PLANNING** application in your browser.
2. Enter your assigned **username** and **password** in the login fields.
3. Click **Log In** to access the application.
4. If your credentials are valid, you will be redirected to the booking list.

If you experience login issues, contact your system administrator to verify your credentials or request a password reset.

Using Single Sign-On (SSO)

If Single Sign-On (SSO) is enabled, you can log in using your **Microsoft** or **Google** account — either personal or company-managed. This allows quick and secure access without the need to create a separate GATE PLANNING username and password.

1. On the login screen, click Sign in with SSO (or the corresponding option provided by your organization).
2. You will be redirected to your organization's secure login page.

3. Enter your corporate username and password, and complete any additional authentication steps required (e.g., two-factor authentication).
4. Once authenticated, you will be redirected back to GATE PLANNING with full access to your assigned features.

Note: The first login with a **Microsoft account** may require one-time approval by your IT administrator to authorize GATE PLANNING for your organization.

SSO streamlines access while enhancing security through centralized authentication.

Booking Management

Booking Lifecycle

Each booking in GATE PLANNING follows a **structured lifecycle**, transitioning through **various statuses** as the transport process progresses. These statuses define the booking's current state and determine what actions can be performed by users based on their assigned roles.

Booking Statuses and Their Roles

- **PREBOOKED** – The transport window is reserved, but final confirmation is still pending.
 - It is not possible to create a PREBOOKED booking after the cutoff time - this applies to all users, including administrators.
 - If the **Cutoff cancellation** setting is enabled, the booking will be automatically cancelled if it is not confirmed before the cutoff time.
 - Specific mandatory fields must be completed before transitioning into this status.
- **BOOKED** – The booking is finalized and confirmed. The warehouse is expecting the truck to arrive at the scheduled time.
 - Similar to Prebooked, this status requires certain mandatory fields to be filled before a booking can be created or updated.
 - Once a booking is in this state, only users with the appropriate role permissions can modify or cancel it.
- **ARRIVED** – The truck has checked in at the warehouse and is waiting for handling. This status indicates that the transport has reached the warehouse premises, and further processing is expected.
- **PROCESSING** – The loading or unloading process is actively taking place. The warehouse staff is handling the goods, and modifications to the booking may be restricted based on role permissions.
- **PROCESSED** – The warehouse has finished handling the goods. At this stage, the truck may still be on-site but is no longer being actively processed.

- **CLOSED** – The transport order is fully completed, and no further modifications are allowed. The booking remains stored in the system for reference and reporting.
- **CANCELLED** – The booking has been officially cancelled. No further actions can be performed on this transport.

Customizing the Booking Workflow

The entire booking workflow in GATE PLANNING is fully customizable through **role-based permissions**. Different warehouses operate with different workflows, and the system allows flexibility in defining who can create, edit, and approve bookings.

For example:

- In some warehouses, carriers can create both Prebooked and Booked reservations.
- In others, carriers create Prebooked bookings, while the warehouse staff confirms them by transitioning them to Booked.
- Some warehouses have warehouse staff handling both Prebooked and Booked statuses, while carriers only update shipment details.

Permissions determine **who can move a booking between statuses**, who can modify existing bookings, and who has read-only access. These settings are managed in the [Roles & Permissions](#) section.

Bookings List

The **Booking List View** provides an overview of all transport bookings, allowing users to efficiently filter, search, and export booking data. This view offers quick access to essential booking details such as date, status, carrier, process, and assigned slots.

Bookings											
List of your existing transport bookings, where you can filter and search for specific information. Filtered records can be exported and downloaded in Excel file format. The file contains complete details for each record.											
× 01.03.2025 × 31.03.2025 ↻ 📄 Export BOOKED × ● Inbound × 🔍 Search											
	Booking ID	Date	Planned window	Slot	Status	Carrier	Customer	Process	Transport type	Specification	License plate
...	1761808	26.03.2025	10:00-10:59	Gate 3	BOOKED	CargoNova Express	Grenton Foods Co.	● Inbound	Semi-truck		5SX 2345, 2B8 9452
...	1761816	26.03.2025	09:00-09:59	Gate 3	BOOKED	CargoNova Express	Brixell Components	● Inbound	Semi-truck		TR12345
...	1761814	26.03.2025	08:00-08:59	Gate 3	PREBOOKED	CargoNova Express	Aurovia Textiles	● Inbound			

Filtering and Searching Bookings

Users can refine the booking list using several filters and search options located above the table:

- **Date Filter:** Select a date range to view bookings within a specific period. Leave empty to display all available records.
- **Status Filter:** Select specific booking statuses, such as Prebooked, Booked, Arrived, Processing, Processed, Closed or Cancelled to narrow down the list.
- **View Filter:** Enables switching between predefined views that organize bookings based on selected processes, making it easier to focus on specific operations (e.g. Inbound, Outbound).
- **Search Bar:** Enter keywords to search across multiple fields, including Booking ID, carrier name, customer, and transport type.

After selecting filter criteria, click the Search or Reload button to update the displayed results.

Booking List Columns

Each row in the booking list represents an individual booking, with key information displayed in structured columns:

- **Booking ID:** A unique identifier for each booking (clickable for quick access).
- **Date:** The planned transport date.
- **Planned Window:** The expected time slot for arrival. Delays are indicated visually.
- **Slot:** The assigned warehouse gate or dock.
- **Status:** The current state of the booking (e.g., Booked, Cancelled), color-coded for easy identification.
- **Carrier:** The transport company responsible for the shipment.
- **Customer:** The client associated with the booking.
- **Process:** The warehouse process (e.g., Receiving or Shipping).
- **Transport Type:** Specifies the type of transport used.
- **Specification:** Additional details about the shipment.
- **License Plate:** The truck's license plate number.
- **Driver Name:** Name of the assigned driver.
- **Pallets/Parcels:** Summary of the shipment size.

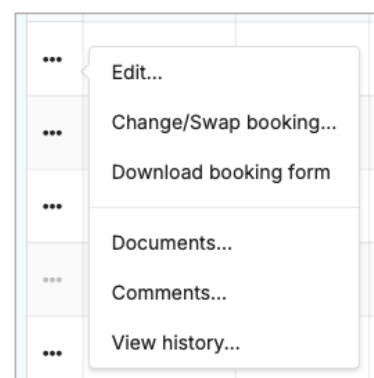
Tip: Clicking on a Booking ID opens the full booking details for further actions.

Quick Actions in the Booking List

Each booking entry in the table includes a context menu (⋮) that allows users to perform quick actions. These actions depend on the user's assigned permissions and are also available in the Daily View.

Available Actions

- **Edit...**



Opens the full booking form for viewing or editing details, depending on user permissions.

- **Change/Swap booking...**
Opens the rebooking dialog, allowing users to change the assigned date, time, or slot for the booking.
- **Download booking form**
Generates a downloadable PDF document with booking details, useful for printing or sharing offline.
- **Documents...**
Opens a pop-up with the list of attached documents. Users can view, download, or upload files, based on their role.
- **Comments...**
Opens the comments panel in a new window. Depending on permissions, users can view existing comments and add new public or internal notes.
- **View history...**
Displays a detailed change log of the booking, including timestamps and users who performed each change.

These quick actions provide fast access to key booking functions without opening the full form. Access is role-based and reflects individual permissions.

Exporting Booking Data

Users can generate a detailed **Excel export** of their bookings for reporting, data analysis, or record-keeping. The exported file contains **all relevant booking details**, including timestamps, carrier information, process types, and additional reference fields.

How to Export Data

1. Apply any necessary filters in the Booking List View (optional).
2. Click the Export button above the table.
3. The system will generate and download an .xlsx file containing the booking data.

Contents of the Exported File

The exported file dynamically includes all available booking fields based on the specific warehouse configuration. The number of columns may vary, as it contains a comprehensive dataset, including timestamps, transport details, warehouse-specific attributes, and additional reference information.

Key fields include:

- **Booking ID** – A unique identifier for each booking.
- **Reference Number** – Internal reference assigned to the booking.
- **Planned Date & Time** – The scheduled arrival time.
- **Original Planned Date & Rebooking Info** – Details of any rescheduled bookings.

- **Reason for Rebooking** – If applicable, the reason and responsible party.
- **Slot & Duration** – The assigned gate (slot) and allocated time in minutes.
- **Booking Status** – Status at the time of export (Prebooked, Booked, Cancelled, etc.).
- **Carrier & Customer** – The transport company and recipient associated with the booking.
- **Process Type – Classification** of the booking (Receiving, Shipping, etc.).
- **License Plate & Driver Name** – Vehicle and driver details, if recorded.
- **Pallet/Parcel Count** – The number of transported units.
- **Timestamps** – Various time entries for tracking truck movements (e.g., Arrival, Processing, Dispatch).
- **Warehouse & Customs Details** – Additional administrative data if required.

Note: The exported file contains all available data at the time of export. If certain fields are empty, they were not filled in during the booking process.

Schedule

The Schedule page provides a structured view of warehouse bookings.

Monthly View – A high-level overview of booking capacity and planned activity for each day.

Daily View – The primary workspace for planning and managing bookings, including slot assignments and real-time scheduling adjustments.

Each view serves a distinct purpose in warehouse operations, ensuring efficient planning and execution of transport schedules.

Monthly View

The Monthly View displays all booking activity across an entire month, offering a quick summary of availability and planned workload.

19	20	21	22	23
26	27	28	29	30
2	3	4	5	6

Detailed description of the calendar grid: The grid shows dates 19-30. Days 19, 20, 22, and 23 are shaded gray. Day 21 is highlighted with a blue border and contains a blue circle with '4', a progress bar at 1/4, and pallet/parcel counts (0/27 and 0/369). Day 26 contains a green circle with '52', a blue circle with '1', a progress bar at 0/1, and pallet/parcel counts (0/33 and 0/240). Other days contain green circles with numbers: 23 (21), 27 (55), 28 (55), 29 (21), 30 (21), 2 (55), 3 (55), 4 (55), 5 (21), 6 (21).

Key Features:

- Each **day block** includes:
 - **Total available slots**
 - **Scheduled bookings** and completion status (progress bars may indicate utilization).
 - **Pallet/parcels counts** if applicable.
- **Closed days** (e.g., holidays, warehouse closures, days without an applied template, or days where the cutoff has already passed) are marked with gray shading in the schedule.
- Clicking on a specific day switches to the **Daily View**, where bookings can be managed in detail.

Note: The Monthly View is primarily informational. New bookings cannot be created directly from this view.

Daily View

The Daily View is the primary workspace for managing warehouse operations. It presents a time-based grid where bookings are assigned to specific gates.

	Gate 1	Gate 2	Gate 3	Gate 4	Gate 5
08:00					
08:30	OPEN	1761811 CLOSED CargoNova Express DEK 9931	OPEN	OPEN CargoNova Express	MULTI Bookings: 2/10 Parcels: 77/100
09:00					
09:30	1761818 PROCESSED RedTrail Movers GHF 85858 LATE	1761810 PROCESSING CargoNova Express LTN 2395	OPEN		MULTI Bookings: 0/10 Parcels: 0/100
10:00					
10:30	1761809 ARRIVED CargoNova Express KZB 8421	OPEN	1761817 BOOKED Haulnix Freightlines FH43494 DELAY	OPEN CargoNova Express	MULTI Bookings: 0/10 Parcels: 0/100
11:00					

Grid Structure:

- The vertical axis represents gates (dock doors).
- The horizontal axis represents time slots (30-minute) throughout the day.
- Each cell in the grid corresponds to a specific gate and time slot.

Booking Status and Slot Interpretation

Color-coded slots indicate booking status:

- **Yellow:** PREBOOKED – Reserved, awaiting confirmation
- **Green:** BOOKED – Confirmed, awaiting arrival
- **Orange:** ARRIVED – Vehicle has arrived
- **Blue:** PROCESSING – Goods are being handled
- **Purple:** PROCESSED – Handling completed
- **Gray:** CLOSED – Slot unavailable / completed

Clicking on a slot opens detailed booking information, allowing users to edit or modify entries.

Adjusting Bookings in the Schedule

The **Daily View** is the **only place** where new bookings can be scheduled and existing ones adjusted.

Adding a New Booking

1. Select an empty slot in the schedule.
2. The booking form opens, allowing users to enter necessary details (process type, carrier, customer, etc.).

3. Once all mandatory fields are filled, confirm the booking (see [Creating and Editing Bookings](#)).

Modifying Existing Bookings

- Use drag-and-drop to reschedule bookings within the grid.
- Move bookings between different time slots or gates to optimize warehouse flow.
- Certain modifications (such as status changes) depend on role-based permissions.

Slot Availability Rules

A slot in the Daily View is only available for booking if certain conditions are met. These conditions depend on template settings, user permissions, cutoff rules, and slot capacity.

Conditions for an Open Slot

For a slot to be available for booking, the following must be satisfied:

- The slot must be open in the assigned template.
 - Some slots may be restricted to specific carriers, customers, or processes based on template settings.
- The cutoff period must not have passed.
 - If the user does not have the "Ignore Cutoff" permission, they cannot book or modify slots after the cutoff deadline.
- User must have permission to create bookings.
 - To see empty slots, the user must have the necessary permissions to create Prebooked or Booked reservations.
- Multi-slot capacity must be available.
 - If the slot is a Multi slot, it must still have remaining capacity based on the number of existing bookings and available parcels.
- Slot visibility must allow it.
 - If the user is a carrier or customer, they will only see free slots if their access is configured to allow visibility of all open slots. Otherwise, they will only see pre-dedicated slots assigned specifically to them.
- Slot Process must be included in the View allowed processes
 - If a slot is restricted to a process that is **not part of the current View**, it will be considered closed and not visible.

Factors That Restrict Slot Availability

- **Template Restrictions:** If a slot is closed or assigned to a specific carrier or customer, it will be unavailable for others.
- **Cutoff Rules:** Once the cutoff deadline is reached, the slot becomes locked unless the user has special permissions.
- **User Role Permissions:** Some user roles can only see their own bookings and cannot access or modify empty slots.

- **Multi-Slot Capacity Limits:** If a Multi slot has reached its maximum number of bookings or parcels, no further reservations can be made.

Quick Actions in the Booking List

Each booking displayed in the **Daily View** schedule includes a quick action menu (⋮) accessible directly from the slot. This menu offers essential tools for managing bookings without opening the full form. The available options depend on the user's permissions.

Available Actions:

- **Edit...**
Opens the full booking form for viewing or editing details, depending on user permissions.
- **Change/Swap booking...**
Opens the rebooking dialog, allowing users to change the assigned date, time, or slot for the booking.
- **Download booking form**
Generates a downloadable PDF document with booking details, useful for printing or sharing offline.
- **Documents...**
Opens a pop-up with the list of attached documents. Users can view, download, or upload files, based on their role.
- **Comments...**
Opens the comments panel in a new window. Depending on permissions, users can view existing comments and add new public or internal notes.
- **View history...**
Displays a detailed change log of the booking, including timestamps and users who performed each change.

Quick actions in the Daily View allow users to efficiently manage individual bookings directly from the schedule interface.

Creating and Editing Bookings

The **booking form** in GATE PLANNING is divided into several sections, each containing specific fields required for processing transport reservations. The form layout ensures that all necessary details are captured efficiently, from initial booking creation to post-arrival updates.

Booking Status Transitions & Permissions

The ability to transition bookings between statuses is determined by user permissions and the completion of required fields. Each status change reflects the progress of the transport process and follows a predefined sequence.

Status Transition Rules

- **PREBOOKED** – A booking can be created in this status if the user has the required permissions.
- **BOOKED** – A booking can be confirmed if all mandatory fields are completed and the user has the required permissions.
- **ARRIVED** – The status changes automatically when the arrival time is entered. To update this field, the user must have permissions for After Arrival fields.
- **PROCESSING** – The status changes when the processing start time is entered.
- **PROCESSED** – The status changes when the processing finish time is entered.
- **CLOSED** – The booking is fully completed once the dispatch time is entered. This status finalizes the record, preventing further modifications.

Note: If a user skips a status and directly enters a later timestamp, the system automatically fills in any missing previous timestamps to maintain process consistency.

Read more about statuses and status workflow at [Booking Statuses](#) and [Customizing the Booking Workflow](#).

Booking Form Structure

The booking form consists of the following sections:

Header – Essential booking information

- Displays **booking status** (e.g., Prebooked, Booked, Closed).
- Indicates the **assigned gate** and **planned booking window**.
- Shows the original planned date (in case of rebooking).
- Displays cancellation and rebooking reason codes, if applicable.

Transport booking #1761814

PREBOOKED

Gate 3

🔔 **Rebooking reason:** CARRIER - Carrier request.

The transport window is reserved for you. The cutoff time for this reservation is 26.03.2025 08:00.

Planned booking window
 26.03.2025 08:00–09:00 Rebook...
 Original planned time: 26.03.2025 09:00

Booking Details – Core data about the transport

- **Carrier & Customer:** The transport company handling the booking and the recipient of the shipment.
- **Process Type:** Defines whether the booking is for Inbound or Outbound operations.
- **Transport Type:** Specifies the vehicle type (e.g., Truck with Trailer).

Booking

Carrier	Customer	
CargoNova Express ▼	Aurovia Textiles ▼	
Process	Transport type	
Inbound ▼	Semi-truck ▼	
Specification		
Truck ID	Trailer ID 1	Trailer ID 2
Driver name		Driver phone
No. of pallets		No. of people

- **Specification:** Text specification of the slot.
- **Truck ID & Trailer IDs:** License plate numbers of the truck and trailers used.
- **Driver Name & Phone:** Contact details of the driver handling the transport.
- **Number of Pallets & Parcels:** Specifies the shipment size.

Custom Fields

- **Custom fields** configured for **Booking** are displayed in this section.
- These fields allow warehouses to collect additional transport details specific to their operations.
- The available custom fields are predefined based on system configuration and cannot be modified directly in the application.

Required Fields: Some fields must be filled before confirming the booking. Mandatory fields depend on whether the status is Prebooked or Booked. To configure mandatory fields, see [Booking Fields](#) in the administration panel.

Content

- **Shipment Numbers, Delivery Notes, Loading Lists:** Users can enter reference numbers and assign quantities.
- **Import/Export Options:**
 - **Download as CSV** – Export content details for external use.
 - **Import from CSV** – Upload multiple shipment references at once.
 - **Copy to Clipboard** – Quickly copy and paste shipment details.

Documents

The Documents section allows users to manage important files related to a booking, such as invoices, customs forms, and safety instructions.

Key Features:

- Upload files via button or drag-and-drop.
- Download and view attached documents.
- Delete or replace files (if permitted).

Note: Users have either read-only access or full control based on their role permissions.

Comments – Internal and external communication

The Comments section allows users to exchange messages related to a booking.

Key Features:

- **Multiple comments** can be added to a booking.
- **Carrier-Warehouse Communication:** Standard comments are visible to both parties.

- **Internal Comments:** Users with the appropriate Internal Comments permission can view and add internal messages. Otherwise, these comments remain hidden.

Note: Internal comments are only accessible to users with the required role permissions.

After Arrival Fields & Actions

Once the truck has arrived, additional fields become available to track the progress of handling operations and update final transport details.

Key Fields:

- **Arrival Timestamp** – The recorded arrival time of the truck.
- **Processing Start & Finish** – The times when loading/unloading begins and ends.
- **Dispatch Time** – When the truck leaves the warehouse.
- **Late Arrival Reason** – If applicable, the reason for the delay.
- **Truck & Gate Details** – Final truck number and real gate number, if different from the original booking.
- **Real Pallet/Parcel Counts** – The actual number of pallets and parcels received or loaded.

Booking Flags (Custom Post-Arrival Indicators)

- Administrators can define custom checkboxes for tracking additional post-arrival requirements (e.g., quality control, weight verification).
- These flags are configurable in Configuration → Booking Flags and appear in this section based on warehouse settings.

Custom Fields

- **Custom fields** configured for **After Arrival** are displayed in this section.
- These fields allow warehouses to collect additional transport details specific to their operations.
- The available custom fields are predefined based on system configuration and cannot be modified directly in the application.

Late arrival & processing

The arrival and processing timestamps entered in this section are used to evaluate Late Arrival and Late Processing based on the thresholds defined in the [Configuration](#).

- If the truck arrives later than allowed, the system marks the booking as Late Arrival and requires a reason code (if defined).
- If the handling time between Processing and Processed exceeds the configured limit, the booking is marked as Late Processing in exports.

Form Action Buttons

The action buttons available at the bottom of the booking form depend on the current status of the booking, the cutoff time, and the user's permissions.

- **Save Prebooking** – Saves the booking in the PREBOOKED status. Available only before the cutoff time and if the user has permission to create prebookings.
- **Save Final Booking** – Confirms the booking to BOOKED status. All mandatory fields must be completed. Available before cutoff with the appropriate permissions.
- **Save** – Saves current changes without changing the booking status.
- **Save & Close** – Saves current changes and closes the form.
- **Cancel Booking** – Cancels the booking. Requires the Booking Cancellation permission and must be used before cutoff (unless the user has the Ignore Cutoff permission).
- **View changes history...** – Opens a list of all changes made to the booking, including timestamps and user actions.

Canceling a Booking

Bookings can be canceled directly from the booking form using the **"Cancel Booking"** button. This action is available only to users with the appropriate **Booking Cancellation** permission.

If any **cancellation reason codes** are defined in the system, selecting a reason becomes **mandatory** before proceeding with the cancellation. This ensures that all cancellations are properly documented and categorized for future reference or reporting.

Once a booking is canceled:

- It becomes read-only and can no longer be modified.
- It remains visible in the booking list and exports, but the slot is released in the schedule and becomes available for new bookings.
- The cancellation reason and timestamp are stored as part of the booking history.
- This functionality supports accountability in warehouse operations and helps identify recurring issues or bottlenecks.

Rebooking

GATE PLANNING allows you to change or swap an existing booking using the Change/Swap booking dialog. This is useful when a reservation needs to be moved due to delays, capacity issues, or other operational needs.

Rebooking can be initiated from the **Quick menu** in the booking list or Daily View, or directly from the **booking form** via the "Rebook..." booking link in the header section.

There are two rebooking options:

Change Slot

Reschedule the booking to a different time window and slot.

- Select a new date to view available planning windows.
- Choose the desired slot for the booking.
- If the system has predefined **rebooking reasons**, selecting one will be mandatory. Otherwise, the field will be hidden.
- Confirm the change by clicking **Reschedule**.

Swap Booking

Swap the current booking with another existing one.

- Select a new date to view available planning windows.
- Switch to the **Swap booking tab**.
- Select a booking to be swapped from the available list.
- The two bookings will exchange time slots and gates.
- **Rebooking reason** is only required if defined in the system.
- Confirm the change by clicking **Reschedule**.

Rebooking options are only visible to users with the Rebooking permission.

Planning Templates

Overview of Planning Templates

GATE PLANNING uses **planning templates** to define the daily availability of booking slots for each warehouse. Templates allow warehouse managers to predefine when and how many time slots will be available, which processes they support (e.g., Inbound, Outbound), and whether they are restricted to certain carriers, customers, or transport types.

Templates are a core element of the scheduling logic. Without an applied template, the schedule is considered closed, and no bookings can be made.

Template List

The Template List provides an overview of all planning templates configured in the system. Each template defines the availability of slots and their behavior for a selected time window, including restrictions for specific carriers, customers, or processes.

Planning templates

Create your own templates for different types of days or seasons. You can assign the template to a given period by selecting the "Apply..." option in the menu, selecting the desired period and type of days.
 Note: Please note that any changes to the active template will be reflected immediately on the scheduler page.

	Name ↓↑	Description	From-To	Slots ↓↑	Processes	Applied ↓↑
...	Workdays - Season Default		00:00 - 22:59	64		115 days in period 24.03.2025-29.08.2025
...	Workdays - non Season		08:00 - 22:59	30		88 days in period 01.09.2025-31.12.2025
...	Weekends		16:00 - 22:59	21		81 days in period 23.03.2025-28.12.2025

The table includes:

- **Name** – Template name. The currently active default template is marked with a label.
- **Description** – Optional internal description for easier identification.
- **From-To** – Time window during the day in which slots can be active.
- **Slots** – Total number of defined time slots in the template.
- **Applied** – Indicates how many days and in which periods the template has been assigned using the Apply function.

Templates can be created or edited using the **Create new template** button, and assigned to specific date ranges using the **Apply...** menu on the scheduler or through the **Clear period...** button to remove previous assignments.

Important: Changes made to templates take effect immediately on the schedule once applied.

Creating Templates

Templates define slot availability for different days, ensuring structured and efficient transport planning. Each template consists of a set of configured slots, which can then be applied to specific dates.

Defining Slot Rules

To edit a template, **click on any slot** in the time grid to open the slot editor. In this editor, you can set whether the slot should be open or closed, and optionally define custom rules that restrict the slot to specific carriers, customers, or processes. This flexibility allows tailoring of slot behavior to the operational needs of each day or time window.

Each slot in a template must be configured with specific rules. Slots are managed using the slot form, where users can:

- Open or Close a slot to determine availability.
- Set a time window length for each slot (minimum is 30 minutes).

- Define slot specifications for internal reference.
- Mark a slot as Emergency to restrict it for warehouse use only.

Slots can be configured individually or across multiple slots using the Rule Range feature.

The image displays two side-by-side screenshots of the 'Edit rule' interface for a 'Dedicated slot'. Both screenshots show a status bar at the top with 'Opened' selected and 'Closed' disabled, and a message 'The slot is opened for bookings.' Below this, there are three tabs: 'General', 'Rules', and 'Multi (parcel) slot'. The left screenshot is on the 'General' tab, showing a 'Time window length' slider set to 3:00 and a 'Slot specification' field containing 'Cross dock'. The right screenshot is on the 'Rules' tab, showing 'Allowed processes' set to 'Inbound', 'Allowed transport types' set to 'Semi-truck', 'Truck with trailer', and 'Rigid truck', 'Allowed carriers' set to 'CargoNova Express', and 'Allowed customers' set to 'Brixell Components' and 'Grenton Foods Co.'. Both screenshots have 'Cancel' and 'Save' buttons at the bottom.

Slot Types & Restrictions

Different slot types allow for flexibility in warehouse scheduling. When defining a slot, users can assign one of the following types:

- **Standard slot** – Open to all bookings.
- **Dedicated slot** – Automatically assigned if the slot is restricted to specific carriers or customers.
- **Emergency slot** – Reserved for warehouse staff and not visible to carriers.
- **Multi slot** – Allow multiple reservations up to a defined limit.

Additional restrictions can be applied to:

- **Allowed Processes** – Restrict slots to Inbound or Outbound operations.
- **Transport Types** – Limit slots to specific vehicles (e.g., Semi-truck, Truck with Trailer).
- **Specification** - Pre-set specification value to limit carriers or warehouse users.

Bulk Editing Slots with Rule Range

Instead of configuring slots manually, users can apply rules across multiple slots at once using the **Rule Range** feature. This streamlines the setup process by allowing bulk modifications without needing to configure each slot individually.

Key Functions of Rule Range:

- Batch application of slot settings to selected gates and time periods.
- Copying settings from existing slots to ensure consistency.
- Drag-and-drop adjustments to rearrange slots easily.

Quick Row/Column Rule Application

In addition to manually selecting a slot range, users can apply rules even faster by using **the row or column shortcut**:

- Clicking the **icon in a row or column header** will automatically apply the rule to the entire row or column.
- This allows for rapid **template adjustments** without needing to select each slot individually.

Note: These shortcuts make bulk slot modifications much faster, ensuring consistency in schedule planning.

Form Action Buttons

- **Save** – Saves the current changes made to the template while keeping the editor open for further modifications.
- **Save & Close** – Saves the changes and closes the template editor.
- **Rule...** – Opens a dialog for bulk slot assignment using rules (e.g., open all slots in a column or a specific time range etc.).
- **Clear all** – Removes all current slot settings in the template, clearing any assigned processes, customers, or carriers.
- **Copy from...** – Allows copying slot configurations from another existing template. Useful for quickly duplicating templates or adapting seasonal variations.

These tools help manage planning templates efficiently and define which time slots are available for different types of operations.

Applying Templates

Once a template is fully configured, it must be applied to specific days for it to take effect.

Steps to apply a template:

EXTERNAL

Apply template Workdays - Season

Template *
Workdays - Season

PeriodFrom * **PeriodTo ***

Select days: *

All days Monday

Work days Tuesday

1. Select a pre-configured template from the list.
2. Choose a specific date or recurring period.
3. Save the changes - carriers will now see available slots based on the active template.

Note: If no template is assigned to a specific day, no slots will be available for booking. However, a template can be marked as **Default**, which will automatically apply it to weekdays (excluding weekends and configured holidays) when no other template is set.

Administration

The Administration section provides full control over **user management, system configurations, and booking rules**, ensuring the application is tailored to the specific needs of each warehouse. Administrators can manage users, permissions, carriers, customers, planning rules, and booking workflows.

Access to **Administration** is available **via the main menu**, located at the bottom of the interface.

Key Areas of Administration:

- **User Management & Roles** – Create and manage user accounts, assign roles, and configure permissions.
- **Carriers & Customers** – Define which carriers can book for which customers.
- **System Configuration** – Set cutoff times, booking rules, and process definitions.
- **Booking Customization** – Configure booking fields, flags, and reason codes to align with warehouse operations.
- **Holidays & Planning** – Manage public holidays that impact template planning and slot availability.

Note: Administration settings impact how bookings are created, modified, and managed. Changes should be made carefully to avoid disruptions to warehouse scheduling.

User Management

The **User Management** section allows administrators to manage access to the system by **creating, editing, and approving user accounts**. Each user is assigned a role that defines their permissions and system access.

Creating and Editing User Accounts

Administrators can create new users by clicking "**Create new user**" and filling in the required details:

- **Username & Email** – Unique identifier for login.
- **Full Name** – Optional field for user identification.
- **User Role** – Defines the user's level of access (e.g., Admin, Carrier, Customer).
- **Carrier/Customer Assignment** – If applicable, links the user to a specific carrier or customer.
- **Approval & Lock Status** – Users must be approved before they can access the system. Locked accounts cannot log in.

Existing users can be edited at any time to update their details, change roles, or reset passwords.

Assigning Roles to Users

Each user must be assigned a role, which determines what actions they can perform in the system.

Role-based permissions control:

- Who can create and confirm bookings.
- Who can modify templates and planning settings.
- Who can approve or manage other users.

Roles are managed separately in the [Roles & Permissions](#) section.

Setting Notification Preferences

Users can configure email notifications based on system events, such as:

- New reservation created in Prebooked status.
- Booking confirmed (Booked status).
- Booking rescheduled, canceled, or closed.
- Truck delays, new comments, or uploaded documents.

Note: Notifications can be enabled or disabled per user to avoid unnecessary alerts.

Roles & Permissions

The Roles & Permissions section allows administrators to manage user access levels by assigning predefined roles. Each role has a fixed set of permissions that determine who can create, modify, or approve bookings and manage system settings. New roles cannot be created, but permissions within existing roles can be adjusted.

Predefined User Roles

GATE PLANNING includes the following fixed roles:

- **ADMIN** – This role is used for system administrators who have full access to manage user accounts, roles, system configuration, and booking processes. Admins can modify all settings and oversee the entire system.

- **CARRIER** – Assigned to transport companies, allowing them to manage their own bookings based on configured permissions. Carriers can typically create, edit, and cancel their own bookings but cannot manage system-wide settings.
- **CUSTOMER** – Used for companies that receive or send goods via the warehouse. Customers can view and manage their bookings according to the assigned permissions.
- **WH ADMIN** – A warehouse administrator responsible for managing internal warehouse operations, including carrier assignments and transport planning.
- **WH TRANSPORT** – Typically assigned to warehouse personnel handling transport coordination. They can manage transport-related bookings but do not have full administrative access.
- **WH USER** – A general role for warehouse staff with basic access to manage bookings and operational workflows.

Note: These roles define user responsibilities and access levels. While new roles cannot be created, permissions within each role can be adjusted to fit specific warehouse requirements.

Configuring Permissions

Permissions define what actions a user can perform. These are divided into categories:

System Permissions

- **System Administration** – Allows management of user accounts, role assignment, and account approvals. Allows to modify role permissions.
- **System Configuration** – Grants access to global configuration settings, processes, view, booking fields etc. in the Configuration section.
- **Partner Management** – Enables editing of **Carriers** and **Customers**, including visibility settings and access relationships between them.

Booking Actions

- **Prebooking** – Allows the creation of a new reservation in the **PREBOOKED** status. Without this permission, users cannot see or book available slots unless they have rights to Final Booking.
- **Final Booking** – Enables the transition from **PREBOOKED** to **BOOKED** status, confirming the slot or creation of a new reservation in the **BOOKED** status.
- **Rebooking** – Allows modification of the booking date, time, or assigned slot.
- **Booking Changes** – Allows editing of booking details (excluding time/date) after confirmation — such as license plates, driver information, comments, documents, or transport content.
- **Booking Cancellation** – Allows users to cancel an existing reservation and assign a cancellation reason code.
- **Edit After Cutoff** – Permits editing of certain fields after the cutoff deadline, depending on field configuration. Without it, most fields are locked post-cutoff.

Booking Form Access

- **Booking Fields** – Grants access to the booking section on form.
- **After Arrival** – Allows editing of arrival-related fields — such as timestamps, condition updates, or post-arrival actions.
- **Comments** – Grants access to view and post **public comments** visible to all parties (carrier, customer, warehouse).
- **Internal Comments** – Allows viewing and adding **internal comments**, visible only to selected internal roles (e.g., warehouse, admin).
- **History** – Displays a change log for bookings, including who made which change and when — useful for audits and tracking.

Special Permissions

- **Ignore Cutoff** – Allows users to create or modify bookings even after the cutoff time has passed — typically used by warehouse admins or superusers.
- **Emergency Slot** – Grants access to **emergency slots**, which are hidden from regular users and used for last-minute or urgent transports.

Note: Role-based permissions directly affect booking behavior by defining whether a user can create, confirm, edit, or cancel bookings, as well as what parts of the booking form they can access or modify.

Carriers

The **Carriers** section allows administrators to manage **transport companies** that have access to the system and can be assigned user accounts. Each carrier can have **specific permissions** controlling which **customers they can book shipments for** and which slots they can access.

Managing Carrier Details

To create or edit a carrier, administrators can define the following details:

- **Carrier Name** – The official name of the transport company.
- **Carrier Number** – Optional identifier for reference.
- **Address, Email, Phone** – Contact details for the carrier.

Carriers can be created or updated at any time, and any associated users will inherit the defined restrictions.

Customer Access Restrictions

Each carrier can be assigned a list of allowed customers:

- **If the list is empty**, the carrier can book shipments for all customers without restrictions.
- **If specific customers are selected**, the carrier can only book shipments for those companies.

This setting ensures that transport providers only create bookings for authorized customers, preventing unauthorized scheduling.

Slot Visibility Permissions

Carriers can be restricted in **which slots they see and can book**:

- **Show all free and dedicated slots** – Carrier sees both general availability slots and those dedicated to them.
- **Show only dedicated slots** – Carrier can only view and book slots specifically assigned to them.

This ensures **warehouse-specific slot allocation**, preventing overbooking or misuse of dedicated time windows.

Note: These restrictions help maintain operational control over which carriers can book for which customers and when they can schedule arrivals.

Customers

The **Customers** section allows administrators to manage **companies receiving or sending shipments** through the warehouse. Similar to **Carriers**, each customer can have specific **permissions controlling** which **carriers can book shipments for them** and which slots they can access.

Managing Customer Details

To create or edit a customer, administrators can define the following details:

- **Customer Name** – The official name of the company.
- **Customer Number** – Optional identifier for reference.
- **Address, Email, Phone** – Contact details for the customer.

Customers can be created or updated at any time, and any associated users will inherit the defined restrictions.

Carrier Access Restrictions

Each customer can be assigned a list of allowed carriers:

- If the list is empty, all carriers can book shipments for this customer.
- If specific carriers are selected, only those transport providers can create bookings for the customer.

This setting ensures that **only authorized carriers** can manage shipments for a given customer, preventing unwanted bookings.

Slot Visibility Permissions

Customers can be restricted in which slots they see and can book:

- **Show all free and dedicated slots** – Customer sees both general availability slots and those dedicated to them.
- **Show only dedicated slots** – Customers can only view and book slots specifically assigned to them.

This ensures **warehouse-specific slot allocation**, preventing overuse of general availability slots when dedicated slots exist.

Note: These restrictions help maintain **clear booking rules**, ensuring customers only book with the correct carriers and within the allowed time slots.

Configuration

The **Configuration** section allows administrators to manage key system settings that control **booking rules, scheduling constraints, and warehouse-specific configurations**. These settings define how **carriers, customers, and warehouse staff** interact with bookings, schedules, and operational workflows.

General Settings

- **Application Name** – Defines the name displayed in the header and emails.
- **Warehouse Support Contact** – The email address of the site administrator who handles queries, approvals, and booking cancellations.
- **Warehouse Address** – Used for reporting and documentation purposes.

Cutoff Settings

Cutoff rules determine when bookings can be modified or confirmed before the scheduled time.

Administrators can select between:

- **Sliding Cutoff** – A **dynamic deadline** based on the planned arrival time. Example: If set to 01:00, the booking can be modified up to 1 hour before arrival.
- **Fixed Cutoff** – A **predefined deadline** before the planned arrival. Example: If set to D-1 12:00, bookings must be finalized by noon on the previous day.

Cutoff Cancellation – If enabled, unconfirmed bookings (Prebooked) are automatically cancelled once the cutoff time has passed.

Note: Users with the Ignore Cutoff permission can modify bookings after the cutoff period.

Scheduling and Visibility Rules

These settings control how far ahead bookings can be created and managed:

- **Forward Visibility** – Defines how many **days into the future** bookings can be scheduled. Example: If set to 20, users can create reservations up to 20 days in advance.
- **Max Date Allowance** – Limits the number of days ahead **that can be stored in date fields**. Example: If set to 3, date-based entries cannot exceed 3 days beyond the current date.

Late Arrival & Processing Time

- **Late Arrival** – Specifies the latest possible arrival time before a transport is flagged as “late.”
- **Max Processing Time** – Defines the maximum allowed duration for loading/unloading operations.

Late Status Evaluation

Late Arrival is triggered when a truck does not arrive within the expected time window. The arrival must occur *before* the scheduled time window based on the configured threshold (e.g., 15 minutes early). If this condition is not met, the booking is marked as a *late arrival*. This is reflected in the booking list, Daily View, and exports. If any reason codes are defined in the system, selecting a Late Arrival Reason becomes mandatory.

Late Processing monitors how long it takes to process a booking between the PROCESSING and PROCESSED statuses. If this duration exceeds the configured maximum, the booking is flagged as late processing. This is shown in the exported data but not in the interface.

System Data Management

- **Reload Cached Data** – Refreshes all cached data to apply recent configuration changes.
- **Download Configuration JSON** – Allows exporting current system settings as a JSON file for backup or deployment to another environment.

Note: The available configuration options may vary depending on warehouse-specific system settings.

Processes

The Processes section allows administrators to define and categorize different warehouse operations, such as Inbound and Outbound logistics. These process categories help structure bookings and enable better visibility and filtering in the system.

Creating and Managing Processes

Administrators can configure processes to align with their warehouse workflows.

Each process consists of:

- **Name** – The identifier for the process (e.g., Inbound, Outbound).
- **Sort Order** – Determines the display order in dropdowns and lists. Lower values appear first.

Example:

- **Inbound** – Used for receiving shipments.
- **Outbound** – Used for shipping goods out.

Processes can be added, renamed, or reordered as needed.

Using Processes in Bookings

Each booking is assigned to a specific process. This classification allows:

- **Better organization** of warehouse operations.
- **Easier filtering** of bookings in the schedule and booking list.
- **Slot restrictions**, where specific slots can be assigned only to certain processes.

Views

Views allow users to combine multiple processes into a single overview, making it easier to filter bookings in the list or schedule view. This is especially valuable in warehouses that use multiple similar processes.

Creating and Managing Views

- **Defining a View** – Each view groups one or more processes, such as Inbound and Outbound, into a unified display.
- **Sorting Order** – Views can be assigned a sort order to control their display sequence.
- **Color Coding** – Each view can be assigned a color to differentiate it from others in the interface.

Usage

- Views are used in the Booking List and Schedule View to quickly filter relevant bookings.
- A default view (e.g., All Bookings) may be set up to show all available processes in one place.

Example Use Cases

A warehouse handling inbound shipments might have separate processes for:

- **Standard Inbound** – Regular supplier deliveries.
- **Express Inbound** – High-priority or urgent shipments.
- **Return Inbound** – Handling returned goods from customers.

Rather than managing these separately, they can all be combined into a single **Inbound View** to provide a unified overview in the booking list and schedule.

Booking Fields

Administrators can define which fields are mandatory at different booking stages and whether they remain editable after the cutoff time.

Booking Field Settings

- **Required for Prebooked** – The field must be completed when creating a booking in the PREBOOKED status.
- **Required for Booked** – The field is mandatory to confirm the reservation to the BOOKED status.
- **Editable after Cutoff** – Allows editing the field even after the cutoff, provided the user has the necessary permissions.

Usage

- Required fields ensure that all critical information is provided before proceeding with the booking.
- Administrators can configure different field requirements based on warehouse or carrier needs.
- If a field is marked Editable after Cutoff, users with the appropriate permissions can modify it even after the cutoff period has passed.

Booking Flags

Booking flags are customizable checkboxes used in the After Arrival section to track key operational events. Administrators can define these flags with unique descriptions and codes to match warehouse-specific workflows.

Administrators can create flags with a custom name and an associated code for easy identification in reports.

Common Use Cases

- **Missing Documents** – Required paperwork (e.g., delivery note, customs declaration) is incomplete or missing.
- **Damaged Shipment** – Goods arrived damaged or packaging compromised.
- **Security Issue** – Seal broken, unauthorized access, or customs inspection required.
- **Insufficient Warehouse Staff** – Delay due to a lack of personnel.
- **Vehicle Not Ready** – The truck was not available when called for loading/unloading.
- **Incorrect Cargo** – Shipment content does not match the booking details.

These flags help track operational issues, improve reporting, and ensure key actions are completed before closing a booking.

Reason Codes

Reason codes standardize the categorization of key booking events, such as cancellations, rebookings, and late arrivals. These codes help ensure consistency in reporting and improve operational tracking.

Key Features:

- **Predefined Categories** – Assigns responsibility (e.g., customer, carrier, warehouse) for each event.
- **Action-Specific Codes** – Used for cancellations, rebookings, and late arrivals.
- **Customizable Definitions** – Administrators can define codes that match warehouse operations.

Common Use Cases

- **CARRIER** - Carrier Issue → Used when a booking is delayed due to transport problems.
- **WEATHER** - Weather Conditions → Applied when adverse weather impacts scheduling.
- **LOADING** - Loading/Unloading Delays → Indicates delays due to warehouse processes.
- **CUSTOMS** - Customs Clearance Delay → Marks bookings held up by customs processing.

These reason codes streamline workflows, making it easier to analyze delays and improve scheduling efficiency.

Holidays

Holidays allow administrators to define public holidays that affect warehouse operations. These dates are automatically reflected in template planning, ensuring slots are not assigned on non-working days.

Key Features

- **Adding Public Holidays** – Users can create holidays by specifying a name and date.
- **Recurring Option** – If a holiday occurs annually (e.g., New Year's Day), it can be marked as recurrent.
- **Integration with Scheduling** – Holidays automatically influence slot availability in the monthly schedule, preventing carriers from booking on restricted dates.

By configuring holidays, warehouses can ensure efficient scheduling while accounting for non-operational days.

Internal Configuration

Some parts of the GATE PLANNING setup are not accessible through the standard user interface and can only be changed by system administrators or technical support. These settings are usually defined during onboarding or adjusted later upon request.

These include:

Slot preview customization

The information shown in the daily schedule view (e.g. driver name, truck ID, reference numbers) can be adjusted to show different fields on up to four lines. The selection of fields must be configured by support.

Time zone configuration

The application time zone is set at the warehouse level and determines how time-based actions (bookings, inspections, cutoffs) behave. It can only be changed in the system backend.

Optional feature toggles

Some features, such as Truck Inspection, Reference fields in the booking form, or Multi-slot parcel limits, can be turned on or off depending on your needs—but only by support staff.

System-defined lists

Several key data sets are centrally managed and not editable in the UI:

- List of **transport types** (e.g. semi-truck, van, trailer)
- List of **gates or slots** available in the warehouse
- Set of **custom fields** used in bookings

If you'd like to modify any of these settings, please contact your GATE PLANNING support team.

User Preferences

The User Preferences allows users to personalize their experience in the system by adjusting interface settings, managing account details, and customizing notifications. The user menu is accessible by clicking on the username in the top-right corner of the screen.

Available Preferences:

Language Selection

Users can switch between multiple languages to customize the interface based on their preference. Supported languages include English, Czech, German, Spanish, French, Hungarian, Italian, Polish, Slovak, and Chinese.

Dark/Light Mode

Users can toggle between a light and dark theme to optimize visibility and reduce eye strain.

Account Management

Users can update their personal details, such as name and email, as well as review their assigned role and permissions.

Email Notifications

Users can configure which system notifications they want to receive via email.

Available options include:

- Booking creation or confirmation updates
- Booking cancellations
- Rescheduled bookings
- Delayed truck notifications
- New document uploads
- Comments added to a booking

These settings allow users to tailor their interaction with the system to match their workflow and notification preferences.

Deployment

GATE PLANNING is deployed **individually for each warehouse location**. Each warehouse receives its own dedicated instance, accessible via a unique URL in the format:

your-warehouse.gateplanning.com

This approach ensures that:

- Each site has its own configuration and settings.
- Access is clearly separated for carriers and warehouse staff.
- There's no confusion between different regions, countries, or warehouse sites.

Activation Process

To request a new GATE PLANNING instance, simply go to our activation portal: launch.gateplanning.com

There you can:

- Fill in a simple request form.
- Provide required configuration and billing details.
- Track the progress of the activation.

Note: Most instances are created within one business day after the request is submitted.

API Access

GATE PLANNING provides two types of APIs to support integration with external systems.

Application API

Each warehouse instance includes its own **fully-featured API**, which mirrors the main application's capabilities. Users authenticate using their standard login and can interact with bookings, schedules, templates, and more.

Common use cases:

- Integration with WMS (Warehouse Management Systems)
- Automated gate access control
- Internal tools that create or update bookings

The API is specific to each instance and available at:

<https://your-warehouse.gateplanning.com/api>

Reporting API

The Reporting API is a read-only interface that allows access to historical and live booking data using an API key.

Key features:

- Designed for data extraction and analytics
- Can consolidate data across multiple instances
- Ideal for dashboards, reporting tools, or external BI systems

Reporting API is available at: <https://api.gateplanning.com/report/>

Security & Access Control

GATE PLANNING is built with a strong focus on security, access management, and data protection. The system is certified under **ISO/IEC 27001 (ISMS)**, ensuring compliance with internationally recognized information security standards.

Authentication and Access

- Users can log in using their username and password, or via Single Sign-On (SSO) with Microsoft or Google accounts.
- Each user is assigned a role that defines their exact permissions within the system.
- Multi-Factor Authentication (MFA) is available and can be enabled by each user individually via their profile settings.

Role-Based Permissions

- GATE PLANNING uses strict role-based access control (RBAC) to define what each user can view, create, edit, or delete.
- Permissions can limit access at the level of individual actions (e.g., status changes), form fields, or sections of the interface.
- Roles also control visibility of data after cutoff times, internal comments, and sensitive timestamps.

Activity Logging and Audit Trail

- All actions on bookings — including creation, edits, status changes, and time entries — are fully logged.
- Every log entry shows who performed the action and when, providing full transparency and traceability.
- Logs are accessible in the booking's History tab for auditing and accountability.

Data Isolation

- Each warehouse uses its own **dedicated instance** of GATE PLANNING, typically accessible via a unique subdomain (e.g., site-name.gateplanning.com).
- While all instances run on a shared infrastructure, **data is logically separated** using a strict internal access key, which enforces complete isolation at the application level.
- This design ensures that **users can never access data from other warehouses**, even if they use the same login across multiple sites.
- Additional visibility rules — based on user roles, slot access, and customer-carrier relationships — provide another layer of access control.

API Security

- The Application API requires user authentication and respects all assigned permissions.
- The Reporting API is read-only and accessible via an API key, designed for secure data exports and dashboard integrations.
- All API traffic is encrypted via HTTPS, and unauthenticated access is blocked by default.

Hosting, Backups, and Infrastructure

- GATE PLANNING runs in a secure cloud environment with enterprise-grade availability.
- Daily backups of all application data are performed and retained for recovery purposes.
- System and database access is limited to authorized personnel only, following strict administrative policies.

GATE PLANNING provides a secure and reliable foundation for your warehouse operations — ensuring compliance, protecting your data, and giving you full control over who sees and does what.

Troubleshooting and Support

Common Issues and Solutions

This section provides troubleshooting guidance for frequently encountered problems within the system. Below are some common issues and their possible solutions.

Login Issues

Problem: Unable to log in.

Solution:

- Ensure that your username and password are correct.
- Check if your account is approved by an administrator.
- If you forgot your password, use the password reset option.
- If multi-factor authentication (MFA) is enabled, make sure you enter the correct verification code.

Booking Status Not Updating

Problem: The booking does not transition to the next status.

Solution:

- Verify that all required fields for the status change are filled in.
- Ensure you have the necessary permissions to modify the booking.
- Check if a cutoff time is preventing further edits.
- Refresh the page or clear your browser cache to rule out display issues.

Template Application Errors

Problem: The template is not applying correctly to the schedule.

Solution:

- Ensure that only one template is assigned to a specific day.
- Check if the default template is interfering with manual assignments.

- Verify that the template has properly configured slots and time windows.

Slots Not Visible for Carriers

Problem: Carriers cannot see available slots.

Solution:

- Check if the slot type is restricted to specific carriers or customers.
- Ensure that visibility settings for carriers allow access to both free and dedicated slots.
- Confirm that a planning template has been applied to the selected day.

System Performance Issues

Problem: The system is slow or unresponsive.

Solution:

- Check your internet connection and try refreshing the page.
- If the issue persists, try clearing your browser cache.
- Contact an administrator to see if there are ongoing system updates or server issues.

For persistent issues, users should contact their system administrator or support team for further assistance.

Contact Information for Support

If you encounter an issue that you cannot resolve using this guide, or if you need help with configuration, user setup, or technical questions, please contact the GATE PLANNING support team.

Email: support@mosoftware.cz

Our support team is available during standard business hours and typically responds within one working day.

When contacting support, please include:

- Your warehouse name or instance URL (e.g. your-site.gateplanning.com)
- A clear description of the issue or request
- Any relevant screenshots or error messages

We're here to help you get the most out of GATE PLANNING.


Conclusion

GATE PLANNING provides a comprehensive solution for managing warehouse scheduling efficiently. By utilizing its key features, users can streamline booking processes, enhance visibility, and improve overall operational efficiency.

Key Takeaways

- **Efficient Booking Management** – Easily track and manage bookings with clear status transitions and customizable workflows.
- **Customizable Scheduling** – Use planning templates and slot rules to tailor the system to your warehouse's specific needs.
- **Robust Administration Features** – Fine-tune user roles, permissions, notifications, and system settings for optimal control.
- **Comprehensive Reporting & Compliance** – Utilize booking flags, reason codes, and audit trails to maintain transparency and improve operational insights.

By leveraging these features, **GATE PLANNING** helps warehouses reduce scheduling conflicts, optimize loading/unloading times, and enhance collaboration between carriers and warehouse staff.

 Get started today and take control of your warehouse operations with GATE PLANNING!