

Planboard

Last updated by | David Mishler Gomocho | May 6, 2025 at 12:24 PM GMT+2



Gomocho GSP Portal Planboard

Efficiency: Support Real-Time Task Oversight

What is it (in Gomocha)?

Planboard

What does it do?

Provides a centralized view of tasks and workflows, enhancing project visibility and resource management. Includes: work by location, estimated travel times, field team management, documents overview, route plans, subcontractors, and field quotes.

Why does it matter?

Without clear task oversight, projects can get derailed. The Gomocha Planboard keeps everything on track, improving efficiency and reducing delays.

Real-World Narrative:

In field services, managing tasks across multiple projects often becomes overwhelming.

Not with the Gomocha Planboard. Now, the entire project landscape is visible at a glance. Tasks, technicians, and timelines are all in one place. No more guesswork about project status or resource allocation.

With this clear oversight, bottlenecks become obvious before they become major delays. Resources are allocated efficiently, and project managers make informed decisions right away. In field services, this all translates into one thing: smooth operations.

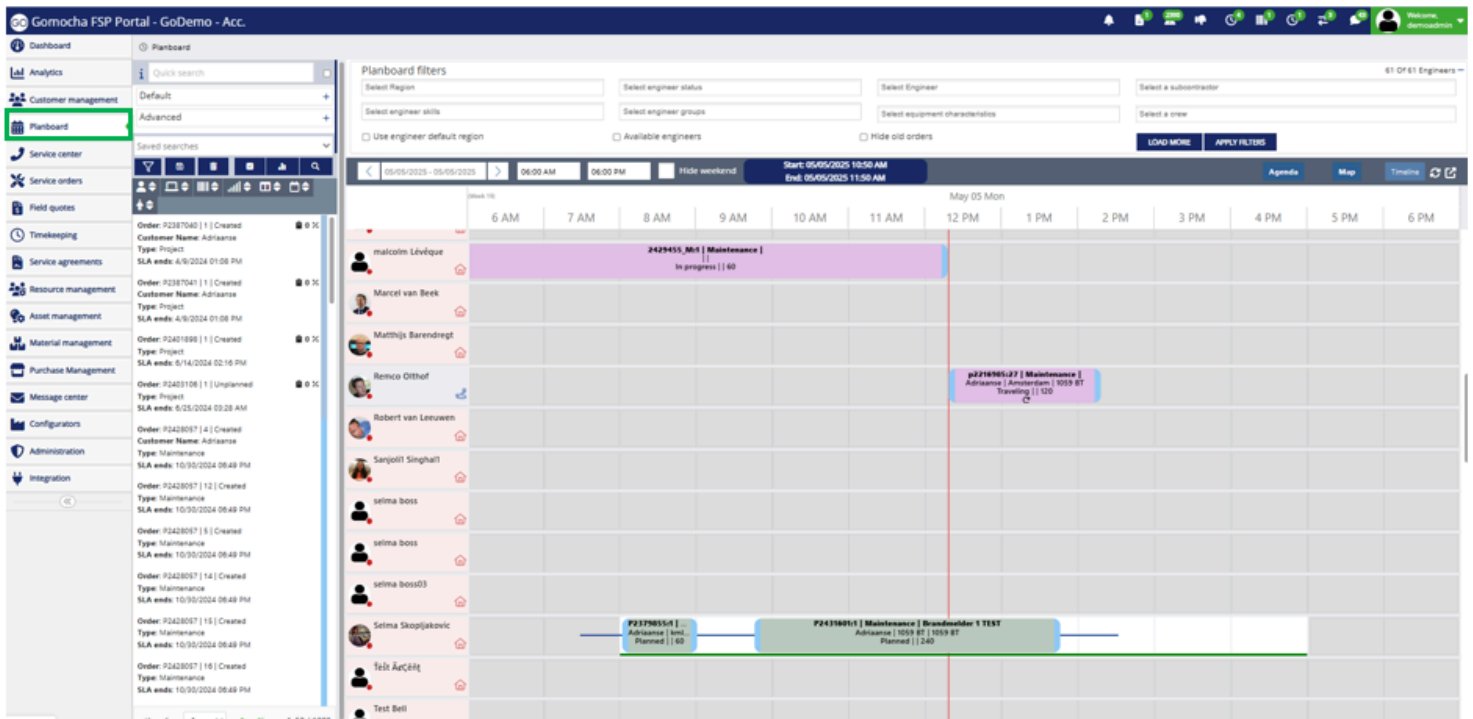
Value Delivered

- Higher throughput
- Increased pace of operations
- Dramatically fewer mistakes

How this fits into the Gomocha Pillars:

- **Efficiency:** Reduces project delays and improves resource allocation
- **Enablement:** Empowers managers to make informed decisions quickly
- **Performance:** Keeps projects on track, meeting SLAs and improving customer experience

Planboard



What is the "Planboard"?

The Planning Screen/Planboard allows users to:

- Manage the planning of engineers and work orders,
- Assign work orders to engineers based on availability.
- Unplan/Replan work orders.
- Edit order information.
- Change status of order (unplanned, cancel, etc.)
- Approve completed work orders.
- Quick assign schedules to engineers

Planning Options: Right Click on Order

- Drag and drop for one or multiple work orders. (tutorial video below)
- Split order
- Unplan order
- Schedule automatically-FMP360 scheduler function
- Time Proposal-FMP360 scheduler function
- Change status

Planning Options: Right Click on Engineer

Planboard filters

Select Region Select engineer status Select Engineer Select a subcontractor 61 Of 61 Engineers

Select engineer skills Select engineer groups Select equipment characteristics Select a crew

Use engineer default region Available engineers Hide old orders

LOAD MORE APPLY FILTERS

05/05/2025 - 05/05/2025 06:00 AM 06:00 PM Hide weekend Start: 05/05/2025 11:15 AM End: 05/05/2025 12:15 PM Agenda Map Timeline

Week 19 May 05 Mon

	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM
malcolm Lévesque	2429455_M1 Maintenance In progress 60												
Marcel van Beek													
Matthijs Barendregt													
Remco Olthoff													
Robert van der ...													
Sanjoel Steen ...													
selma boss													
selma boss													
selma boss03													
Selma Skopljakovic													
félt Árcsét													
Test Bell													

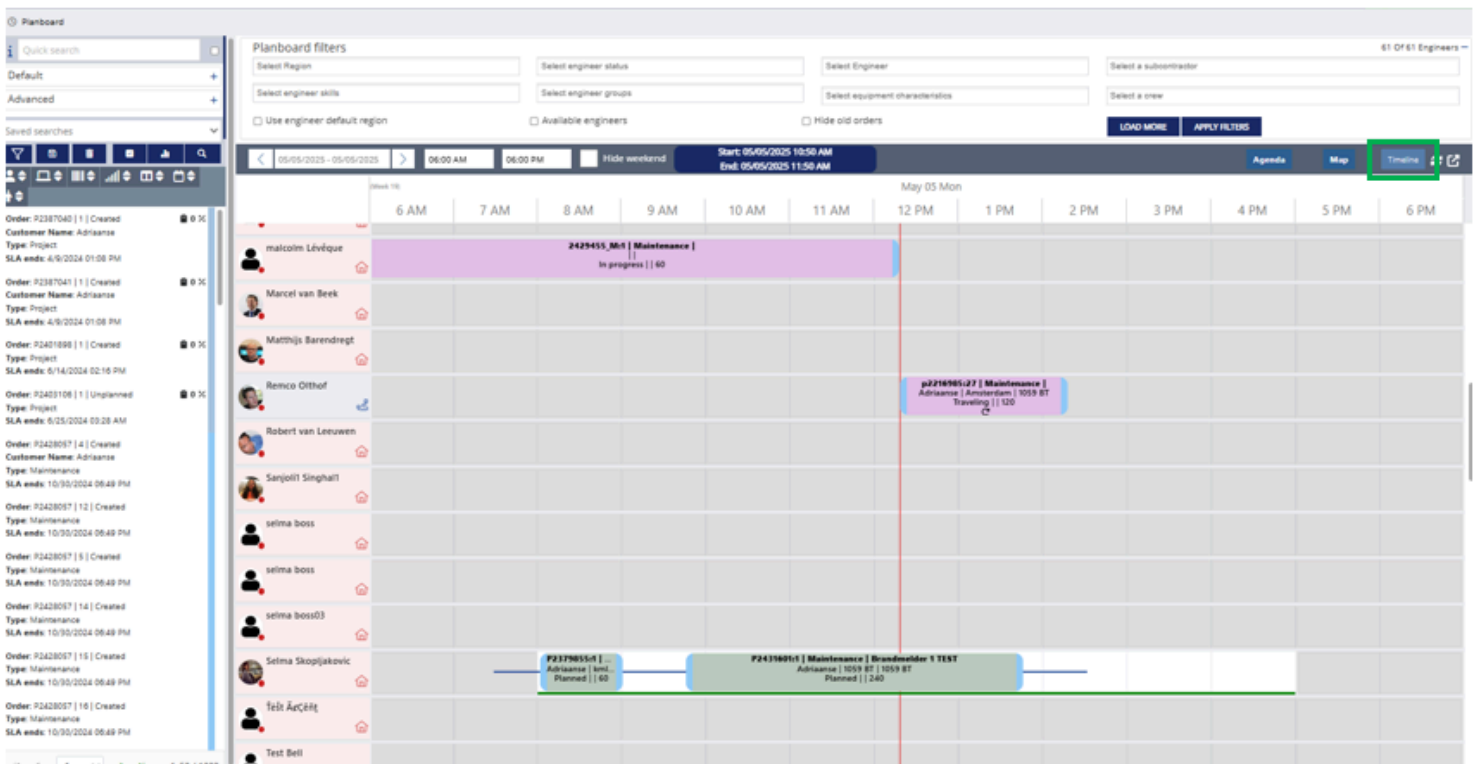
Context menu (highlighted in green):

- Create order
- Replan orders
- Cancel orders
- Unplan orders
- Recalculate route
- Show route on map
- Assign scheduler

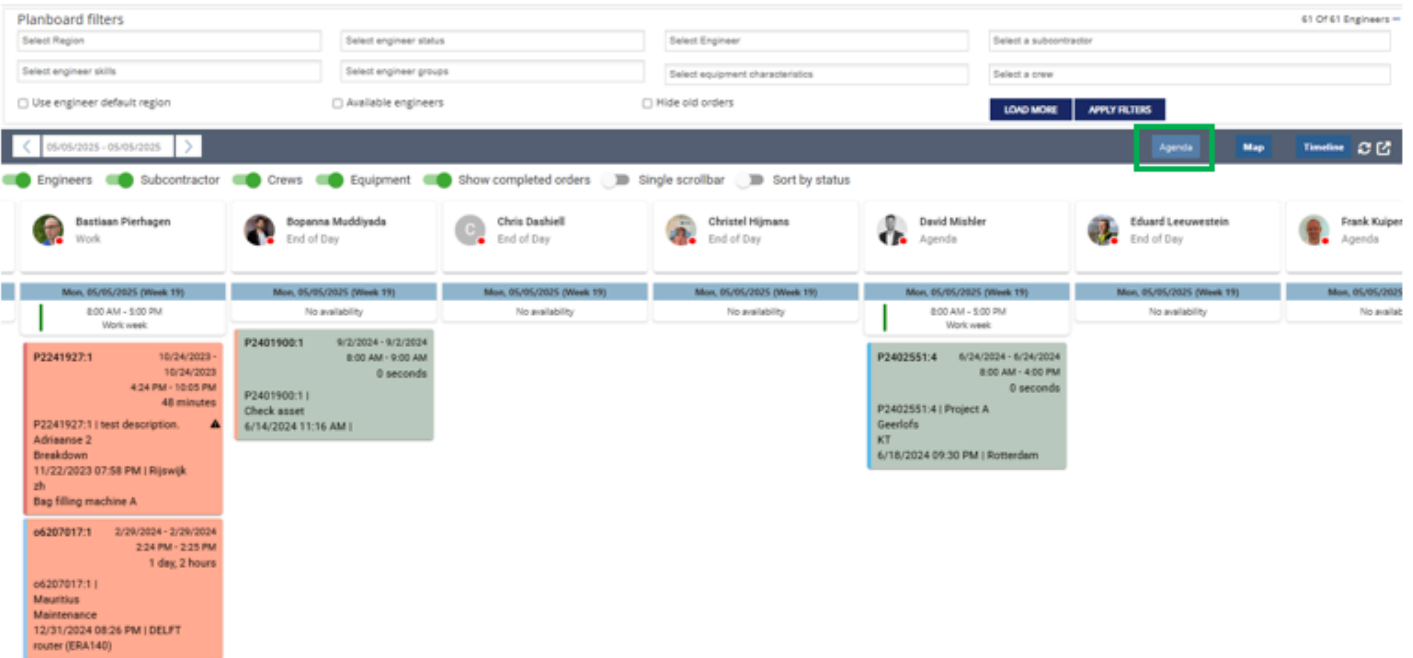
- Replan orders-multiple options (tutorial video linked below)
- Cancel order-multiple options
- Unplan orders-multiple options (tutorial video linked below)
- Recalculate route
- Assign scheduler (to engineer)

Planboard Viewing Options

Timeline View



Agenda View



Map View

- The map view will show the last location of the engineer on the map depending on the last job they worked on.
- The user can see the route the user traveled within that day to all the jobs.

Planboard filters

Select Region Select engineer status Select Engineer Select a subcontractor 61 Of 61 Engineers -

Select engineer skills Select engineer groups Select equipment characteristics Select a crew

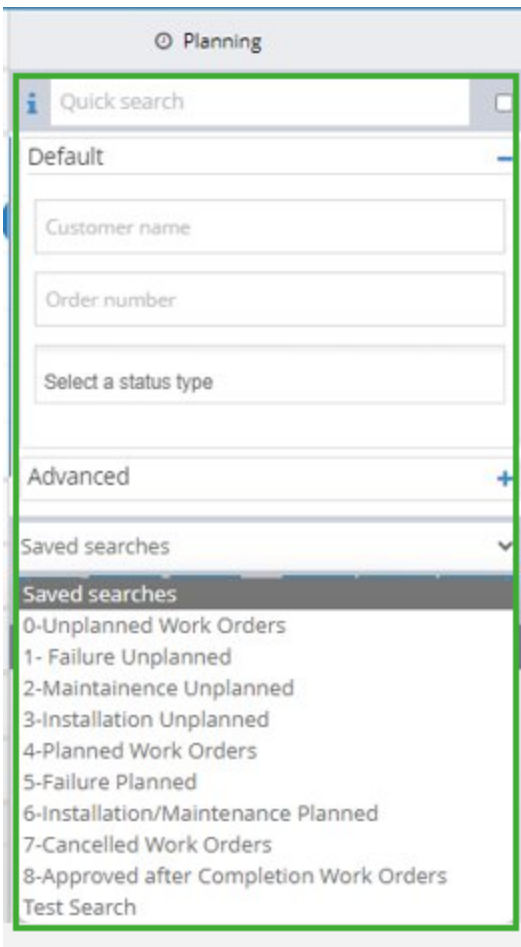
Use engineer default region Available engineers Hide old orders

MORE FILTERS LOAD MORE APPLY FILTERS

05/05/2025 - 05/05/2025 Agenda Map Timeline

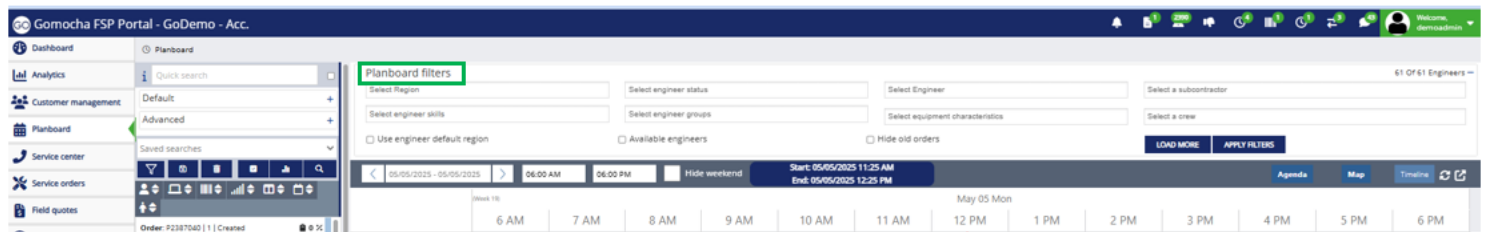
What is configurable on the "Planning Screen/Planboard"?

Order search/saved searches



Planboard Filters

Planboard Filters allow users to quickly sort and view engineers based on specific criteria such as region, skillset, availability, or assigned schedule—making it easier to manage and allocate resources efficiently.



Planboard User Settings: General

Users can set preferred language and time-zone



Planboard User Settings: Planboard Order Search, Planboard, Planboard Agenda

Customers can use user settings in the Plan Board to personalize how order information is displayed in the following areas:

- **Planboard Order Search**
- **Planboard**
- **Planboard Agenda**

Administration > UserSettings

Manage planboard order search user settings

General | **Planboard order search** | Planboard | Planboard agenda

Manage planboard order search items

Line 1 Order

Name	Entity + field	
ActivityExternalId	Activity ExternalId	
ActivitySubId	Activity SubId	
ActivityStatusTypeName	ActivityStatusType Name	

ADD FIELD →

Line 2 Customer Name

Name	Entity + field	
CustomerName	Customer Name	

ADD FIELD →

Line 3 Type

Name	Entity + field	
ActivityTypeName	ActivityType Name	

Order Confirmation pop up-via Layout Designer (Covered under Configurators)

Order: #P2379855:1

Order Registrations Customer Questionnaire Status history

Order Data	Order Planning	Address and contact data
Invoice types	Engineer group	Prefined addresses
Name	Engineers	Street
Order Number	1 - Gomocha - Europe	House Number
Status	Selma Skopljakovic	House number addition
Planned	Preferred engineer	City
Status date and time	Scheduled start date & time	Zip Code
4/28/2025, 8:01 PM	5/5/2025, 8:00 AM	State
Reason	Scheduled end date & time	Country
-	5/5/2025, 9:00 AM	Region
Remark	Duration	Additional Address Info
-	000.01:00	Latitude
Reported time	Default warehouse for engineer	Longitude
3/8/2024, 11:45 AM	-	5.2912659999999994
Customer	SLA start date & time	
Adriaanse	2/10/2025, 9:15 PM	
Assets	SLA end date & time	
Brandmelder 10 S-BM-123456798 A10_test	11/17/2025, 4:15 PM	
Contract	SLA duration	
-	280.01:00	
Type	Recurring order	
Maintenance	No	
Priority	Appointment Fixed?	
-	No	
Override auto-added skills	Engineer Fixed?	
No	No	
Skills	Timeslot startdate	
Electrical, Certificate A, Tile work, KT	-	
Project Number	Timeslot enddate	
-	-	
Description	Fixed timeslot	
-	No	
Customer reference	Cause	
-	-	
Internal remark	Solution	
-	-	
Remark		
-		
Problem		
-		
Free text entry		
-		

Discussion

CHANGE STATUS TO TIME PROPOSAL

ORDERS NEARBY COPY

Activity Type Color-via Master Data (Will be covered in Master Data unit)

The Planboard displays a grid of activity cards. Each card is color-coded by activity type:

- Blue:** Maintenance (e.g., 2346182, 2346196, 2346206, 2346192, 2346201, 2346203)
- Purple:** Installation (e.g., 2346184, 2346190, 2346197, 2346204)
- Orange:** Meeting (e.g., 2346199)
- Red:** Failure (e.g., 2346203)

Highlighted cards (green box):

- 2346182 | Maintenance | Ajax FC | Bastiaan Pierhagen | Maintenance | Waardenburg | 4181AE
- 2346199 | Meeting | Invaro Services and Supplies | Meeting | Hoom | 162B...

How to use, view, and configure the "Planboard."

The following are links to the Dispatch: Planning in the Gomocha Wiki and video tutorials.

- [Planning an Order: Contains a tutorial video](#)

- [Planning Multiple Orders: Contains a tutorial video](#)
- [Replanning Orders: Contains a tutorial video](#)
- [Unplanning Orders: Contains a tutorial video](#)
- [Assigning Schedules Through Planboard: Contains a tutorial video](#)
- [Default planboard settings](#)
- [Plan board user settings](#)
- [Show/Hide week numbers in plan board](#)
- [Edit planboard settings](#)
- [Filtering on Default region](#) - In Progress
- [Show Routes on Map](#)
- [Planning:Creating Saved Searched](#)
- [Automatic Time Registration](#)