GoSmarter

User Manual

AI Production Assistant for Metals Manufacturing

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Getting started with GoSmarter

Welcome to GoSmarter docs! This guide will help you get the most out of the system for supporting your metals manufacturing processes.

If you're new to GoSmarter, check out our comprehensive Customer Onboarding Guide which includes a complete first-week action plan, setup instructions, and training materials.

What is GoSmarter?

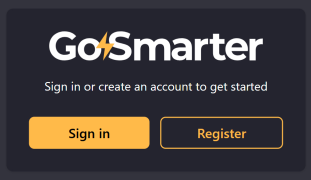
GoSmarter is a tool that helps you manage your metals production and fabrication more efficiently. It helps you:

- Keep track of your metals inventory
- Manage customer orders
- Plan how to cut long products to reduce waste
- Store and find steel mill certificates for quality compliance

Getting Started

Logging In

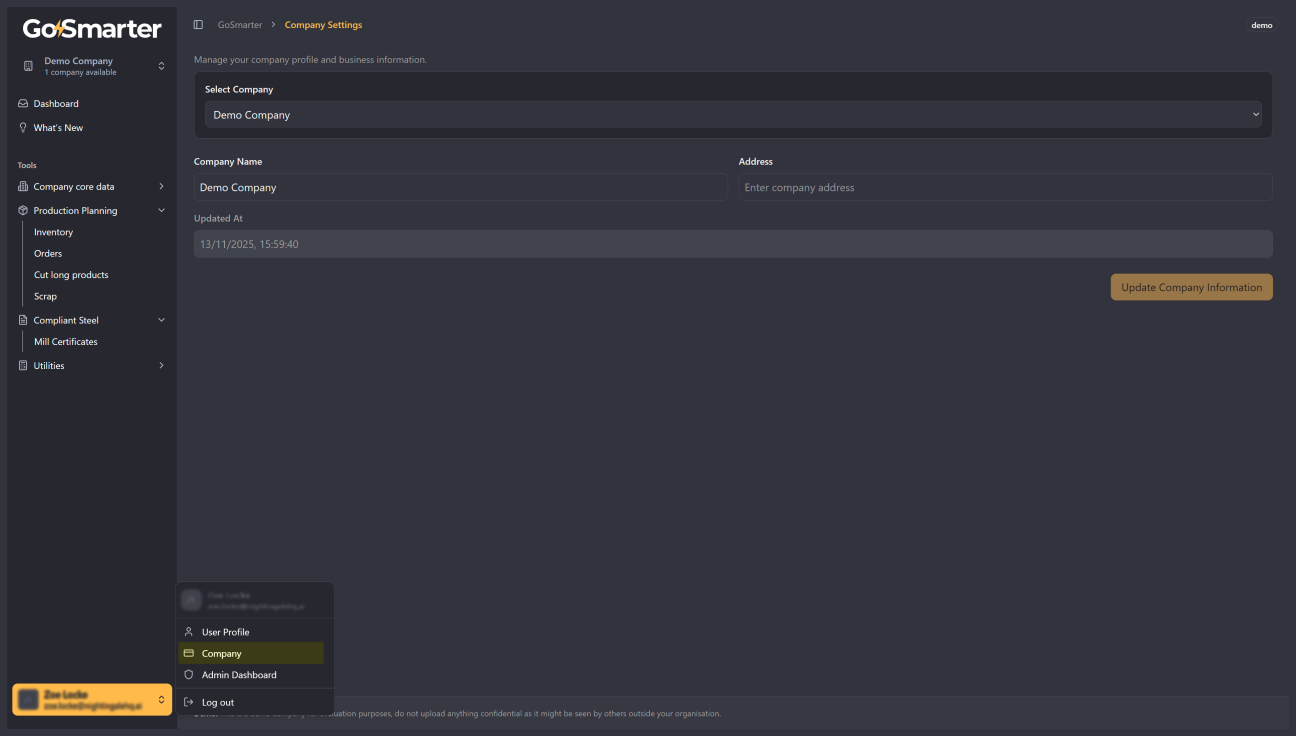
When you first open GoSmarter, you'll see a login screen.



1. Click the **Sign In** button
2. Enter your email address and password
3. You'll be taken to the Dashboard

Selecting Your Company

After logging in, you'll need to select which company location you're working with if you're part of multiple companies.



1. Look at the left sidebar
2. Click on the company name dropdown at the top
3. Select your company from the list
4. All your data will now show for that company

You only need to select your company once. The system will remember your choice next time you log in.

Main Sections

GoSmarter is organised into clear sections. Use the menu on the left side to navigate:

Dashboard

Your starting point.

- View Dashboard Guide

Company core data

Manage your company's key information: - **Materials** - Define steel grades and types - View Materials Guide - **Types** - Set up product types (bars, plates, etc.) - View Types Guide - **Stock Locations** - Manage warehouses and storage areas - View Stock Locations Guide - **Organisations** - Store customers, suppliers, and partners - View Organisations Guide - **Company** - Update your company details - View Company Guide

Production Planning

Handy capabilities you need to plan and manage your metals business:

- **Inventory** - Track all your stock
- View Inventory Guide
- **Orders** - Manage customer orders
- View Orders Guide
- **Cut Long Products** - Plan how to cut long products efficiently
- View Cut Long Products Guide
- **Scrap** - Track scrap in your business
- View Scrap Guide

Compliant Metals

Quality documentation and traceability:

- **Mill Certificates** - Store and search quality certificates
- View Mill Certificates Guide

Utilities

Additional tools and calculators to help you: - **Scrap Calculator** - Estimate scrap percentages - View Scrap Calculator Guide - **Emissions Calculator** - Calculate carbon emissions - View Emissions Calculator Guide - **Business Case Calculator** - Evaluate cost savings - View Business Case Calculator Guide

Common Tasks

Quick Links to Common Tasks

- How do I add new steel bars to inventory?
- How do I create a new customer order?
- How do I find a mill certificate?

Getting Help

Icons and Buttons

Throughout the system, you'll see these common buttons:

- **+ Add** or **+ New** - Create something new
- **Edit** (pencil icon) - Change existing information
- **Delete** (trash icon) - Remove something
- **Download** (download icon) - Save information to your computer
- **Search** (magnifying glass) - Find specific items
- **Filter** (funnel icon) - Narrow down what you see

Tips for Success

1. **Use filters to find things faster** - Instead of scrolling through long lists, use the search and filter options
2. **Check your company selection** - Make sure you're viewing the right company's data
3. **Download important results** - Save cutting plans and reports to your computer for record-keeping

Contact Support

If you need help or something isn't working:

- Contact your system administrator
- Report any errors you see on screen

- Keep note of what you were trying to do when the problem occurred

GoSmarter Documentation

You can download the complete GoSmarter user manual as a PDF:

📄 Download GoSmarter User Manual (PDF)

This PDF version is automatically updated whenever the documentation changes and is perfect for offline reference or printing.

Frequently Asked Questions

Welcome to the Nightingale FAQ! Here you'll find answers to some of the most common questions about our AI solutions, services, and how we can help your business leverage the power of artificial intelligence. If you have a question that isn't covered here, please don't hesitate to get in touch.

Quick Reference Guide

This page provides quick answers to common tasks. Bookmark this page for fast reference!

Getting Started

Task	Steps
Log In	Click Sign In → Enter email and password
Select Company	Click company dropdown in sidebar → Select your company
Navigate	Use left sidebar menu
Log Out	Click your name at bottom of sidebar → Sign Out

Inventory Tasks

Task	Quick Steps
Add one item	Inventory → + Add Inventory → Fill form → Save
Clone one item	Inventory → Find Item → Duplicate
Split one item into two	Inventory → Find Item → Split → Update weight and/or quantity → Save
Upload many items	Inventory → Upload → Use template → Upload file
Edit quantity	Inventory → Find item → Edit → Change quantity → Save
Search inventory	Use the filters section at top of inventory table
Delete item	Find item → Delete (trash icon) → Confirm
Link mill certificate	Edit inventory to add heat code → Save → Upload mill certificate

Order Tasks

Task	Quick Steps
Create order	Orders → + Add Order → Fill details → Save
Upload multiple orders	Orders → Upload → Use template → Upload file
Update order	Orders → Find order → Edit → Change info → Save
Change order status	Edit order → Change Status dropdown → Save
Find order	Use the filters section at top of orders table
Mark order complete	Edit order → Status = Complete → Save

Mill Certificate Tasks

Task	Quick Steps
Upload certificate	Mill Certificates → Upload Certificate → Select file → Upload
Find certificate	Use the filters section at top of mill certificates table
View certificate	Click on certificate row → See details and preview
Download certificate	Open certificate → Download button

Status Indicators

Order Status

- **Pending** - Not started
- **In Progress** - Currently working on it
- **Complete** - Finished

Optimisation Status

- **Running** - Calculating patterns
- **Complete** - Ready to view
- **Failed** - Error occurred (try again)

Certificate Status

- **Uploaded** - File stored in system
- **Verified** - Checked for accuracy
- **Linked** - Connected to inventory

Best Practices Checklist

Daily:

-

-

Weekly:

-

-

Monthly:

-

-

Quick Troubleshooting

Problem	Try This
Can't see any data	Check company selector - is correct company selected?
Changes not saving	Check for error messages, ensure required fields filled
Can't find an item	Clear all filters and search again
Page won't load	Refresh browser (F5) or log out and back in
Upload failed	Check file format and size, try again

Getting Help

Need assistance?

1. Check the full documentation
2. Review the Troubleshooting Guide
3. Contact your system administrator
4. Watch video tutorials (links in each section guide)

Bookmark this page for quick access to the checklists. You can click the checkboxes to help keep track!

Industry Glossary

This glossary explains terms used in GoSmarter. If you're unsure what something means, check here.

A

Allowance

Extra length added to calculations to account for saw blade width when cutting. Usually 5-10mm per cut.

B

Bar

A long piece of steel. Also called "stick" or "length." Typically 6 or 12 meters long.

Batch Number

See Heat Number.

Bulk Upload

Uploading multiple items at once using a spreadsheet file instead of entering them one by one.

C

Certificate

See Mill Certificate.

Company Selector

The dropdown menu in the sidebar that lets you choose which company location you're working with.

Cut Length

The length of pieces you need to cut from longer bars.

Cutting Pattern

A plan showing how to cut pieces from a bar to minimize waste. Shows which pieces to cut and in what order.

D

Dashboard

The main starting page that shows a summary of your operation.

Diameter

The thickness of a steel bar, measured across its circular cross-section. Usually measured in millimeters (mm).

Download

Saving a file from GoSmarter to your computer. Click the download button, and the file saves to your Downloads folder.

E

Excel

Spreadsheet program used for data uploads and downloads. Files end in .xlsx.

F

Filter

A way to narrow down a long list to show only items matching certain criteria. Like searching, but more specific.

G

Grade

The type or classification of steel based on its strength and properties. Examples: Grade 250, Grade 500. Also called "material grade."

H

Heat Number

A unique code from the steel mill identifying the batch of steel. Used for quality traceability. Also called "batch number."

I

Inventory

All the steel bars you currently have in stock at your facility.

K

Kerf

The width of material removed by a saw blade when cutting. Usually 3-5mm. Use the "allowance" field to account for this.

L

Length

How long a steel bar is, measured in millimeters (mm). Common lengths: 6,000mm (6 meters) or 12,000mm (12 meters).

Login

Entering your username and password to access the system.

M

Material

The type or grade of steel. Used interchangeably with "grade."

Mill Certificate (MTC)

An official quality document from the steel manufacturer showing chemical composition, mechanical properties, and test results. Also called "Mill Test Certificate," "Test Certificate," or "Quality Certificate."

Millimeter (mm)

Unit of measurement used for all lengths in the system. 1,000mm = 1 meter.

O

Optimization

The process of finding the best way to cut steel bars to minimize waste. Also called "cutting optimization."

Order

A customer's request for specific steel pieces. Includes specifications like material, diameter, length, and quantity.

P

Pattern

See Cutting Pattern.

PDF

A file format for documents. Used for mill certificates and printable cutting plans. You need a PDF reader to view these files.

Pending

Status indicating something hasn't been started yet. Example: "Pending order" means the order hasn't been worked on.

Piece

An individual cut length of steel. When you cut a bar, you produce multiple pieces.

Q

Quantity

How many pieces or bars. Can mean:

- How many bars in inventory
- How many pieces a customer ordered
- How many times to repeat a cutting pattern

R

Reference Data

Standard information used throughout the system, like material grades and types. This data is pre-loaded and doesn't usually change.

S

Scrap

Material that's left over after cutting and is too short to use. Also called "waste" or "drops."

Scrap Rate

The percentage of material that becomes waste when cutting. Lower is better. Formula: (waste ÷ total length) × 100.

Sidebar

The menu panel on the left side of the screen. Use it to navigate between different sections.

Specification (Spec)

The detailed requirements for steel: material grade, diameter, length, and any special properties.

Status

The current state of something. Examples:

- Order Status: Pending, In Progress, Complete
- Certificate Status: Uploaded, Verified, Linked

T

Template

A pre-formatted spreadsheet file for uploading data. Download it, fill it in, then upload it back to the system.

Traceability

The ability to track steel from the mill through your facility to the customer. Mill certificates provide this.

Type

A category or classification for steel. Different from grade - refers to intended use or form.

U

Upload

Sending a file from your computer into GoSmarter. Opposite of download.

Utilization

How much of your material is actually used vs. wasted. High utilization = less waste = better efficiency.

V

Verification

Checking that information is accurate and correct. For example, verifying mill certificate details against the actual document.

W

Waste

See Scrap.

Common Abbreviations

Abbreviation	Meaning
mm	Millimeters (unit of length)
m	Meters (unit of length, 1m = 1,000mm)
kg	Kilograms (unit of weight)
MTC	Mill Test Certificate
PDF	Portable Document Format (file type)
ID	Identification or Identifier
%	Percent

Common Phrases

"In stock"

Material you currently have available in your inventory.

"On order"

Material you've ordered from suppliers but haven't received yet.

"Run an optimization"

Creating a new cutting plan to find the most efficient way to cut bars.

"Link to inventory"

Connecting a mill certificate to specific bars in your inventory for traceability.

"Upload a template"

Filling in the provided spreadsheet and sending it to the system to add multiple items at once.

"Download results"

Saving the optimization cutting plan to your computer so you can print it or share it.

Units of Measurement

All measurements in GoSmarter use the metric system:

Item Length

- 1 millimeter (mm) = 0.001 meters
- 1,000 millimeters = 1 meter

- 6,000mm = 6 meters
- 12,000mm = 12 meters

Why millimeters?

More precise than meters for steel work. Avoids decimal points (12,000mm instead of 12.0m).

Converting

- Meters to millimeters: multiply by 1,000 (6m × 1,000 = 6,000mm)
- Millimeters to meters: divide by 1,000 (6,000mm ÷ 1,000 = 6m)

Question Words

What to ask when confused about a term:

- **What is it?** - Definition/explanation
- **Why does it matter?** - Purpose/importance
- **When do I use it?** - Situations/applications
- **Where do I find it?** - Location in the system
- **How do I use it?** - Instructions/steps

Don't hesitate to ask your administrator if you need clarification on any term!

This glossary is your quick reference for GoSmarter terminology. Bookmark this page!

Customer Onboarding Guide

Welcome to GoSmarter.ai! This comprehensive onboarding guide will help you get started quickly and begin realizing the benefits of AI-driven production assistance for your metals manufacturing operation.

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1. Introduction: Welcome to GoSmarter.ai

What is GoSmarter?

GoSmarter.ai is your AI-driven production assistant designed specifically for metals manufacturers. We help you:

- **Automate paperwork** - Eliminate manual data entry and reduce administrative burden
- **Track inventory** - Real-time visibility into stock levels and material locations
- **Optimise production** - AI-powered cutting plans that minimize waste and maximise efficiency
- **Ensure compliance** - Digital mill certificate /aterial test report management with instant search and retrieval

GoSmarter was created by people who understand the challenges of metal fabrication and production. We know your time is valuable, which is why we've made setup fast and easy.

Onboarding Overview

This guide will walk you through everything you need to get GoSmarter up and running in your facility. The entire onboarding process typically takes **1-2 days**, and you'll start seeing time savings immediately.

What you'll learn:

1. How to set up your account and invite team members
2. How to configure GoSmarter for your operation
3. How to use core features for daily tasks
4. A structured action plan for your first week

Key Benefits: What to Expect

GoSmarter customers have achieved remarkable results:

- **50% scrap reduction** in rebar cutting with AI-powered production planning
- **120+ hours saved per year** on mill certificate processing and management
- **Instant access** to quality documentation for audits and customer requests
- **Reduced errors** in inventory tracking and order management

Most customers see measurable time savings within the first week of using GoSmarter. This guide will help you achieve similar results.

2. Account Setup and Access

Sign-Up and Login

Getting started with GoSmarter is simple - no complex installation required!

1. **Access the platform** - GoSmarter is cloud-based and accessible via any web browser
2. **Sign up** - Visit app.gosmarter.ai and click **Register**
3. **Verify your email** - Check your inbox for a verification email and click the confirmation link

GoSmarter offers a free trial so you can evaluate the platform risk-free. No credit card required to start, no software to install.

We then do a quick verification with you to confirm your account setup and answer any initial questions. After that, we make you your company space and support you in getting started.

Adding Team Members

GoSmarter works best when your whole team is on board. You can invite people to register and then we can assign them to your company or you can give us a list of people to invite.

Begin with 2-3 key users during onboarding. Once they're comfortable, they can help train additional team members.

Platform Tour: Understanding the Interface

When you first log in, you'll see the main GoSmarter dashboard. Here's what each section does:

[Image: Company selector showing how to choose your location - file not found: company-selector.png]

Key Navigation Areas:

- **Company core data** - Manage information about your company and how you work
- **Production Planning** - The space to manage stock, orders, scrap, and generate cutting plans
- **Compliant Metals** - The area to manage mill certificates and quality documentation
- **Utilities** - Additional tools like a scrap rate calculator

If you manage multiple locations or companies, use the company selector in the top-left corner to switch between them. GoSmarter will remember your selection for future visits.

3. Technical Configuration

Data Onboarding: Getting Your Information into GoSmarter

The key to getting value from GoSmarter is having your data in the system. Don't worry - we've made this easy!

Configure core data (OPTIONAL)

GoSmarter comes pre-configured with sensible defaults for common materials and processes. However, you can customise core data to match your specific operation:

1. Go to **Company core data** > **Organisations** to manage customers and suppliers. You can add new organisations (manually or bulk upload) or edit existing ones.
2. Navigate to **Company core data** > **Materials** to review and customise materials and grades. You can start from our list, bulk upload, or start from scratch.
3. Navigate to **Company core data** > **Inventory Types** to review and customise types of goods. You can start from our list, bulk upload, or start from scratch.
4. Navigate to **Company core data** > **Stock Locations** to set up your storage locations (yards, warehouses, bins). You can start from our list, bulk upload, or start from scratch.

GoSmarter includes a library of common materials and processes to help you get started quickly. Customisation is optional - you can use the defaults if they fit your needs. Setting your defaults now makes it easier for people to enter data later, with fewer risks of picking an incorrect value.

Inventory Import

There are two ways to add your initial inventory:

Option 1: Manual Entry (Good for small inventories or getting started quickly)

1. Go to **Inventory** in the main menu
2. Click **+ New item**
3. Fill in the details:
4. Mandatory fields
    - Name (e.g., Rebar 12x2500mm)
    - Material (e.g., Rebar Grade 60)
    - Quantity
5. Optional fields
    - Diameter, length, width, and depth
    - Type (e.g., bars, rods, etc.)
    - Supplier
    - Stock location (e.g., yard, bin)
    - Unit price
    - Weight
6. Click **Add item**

View detailed Inventory Guide

Option 2: Bulk Upload (Recommended for larger inventories)

1. Go to **Inventory**
2. Click **Bulk actions** > **Download CSV template**
3. Fill in your inventory data using the template
4. Click **Bulk actions** > **Upload CSV**
5. Select **Choose file** and upload your inventory file
6. Click **Upload** to import

GoSmarter uses simple interfaces. No technical expertise needed - if you can use a spreadsheet, you can upload your data.

Order Import

There are two ways to add your initial orders:

Option 1: Manual Entry (Good for small inventories or getting started quickly)

1. Go to **Orders** in the main menu
2. Click **+ New order**
3. Fill in the details:
4. Mandatory fields
    - Order Reference (e.g., Cus ABC-001)
    - Order Date
5. Optional fields
    - Status (e.g., Pending, In Progress)
    - Site (e.g., Project A)
    - Delivery Date
    - Line item(s)
    - Line Item Reference (e.g., Cus ABC-001-001)
    - Shape code (e.g., 01 for rebar)
    - Diameter, length, width, and depth
    - Quantity
    - Price
    - Status (e.g., Pending, In Progress)
    - Heat code (if applicable / when known)
6. Click **Add order**

View detailed Orders Guide

Option 2: Bulk Upload (Recommended for larger order books)

1. Go to **Orders**
2. Click **Bulk actions** > **Download CSV template** to get a zip file with a template for orders and one for order line items
3. Fill in your orders and line item data using the templates - the line items use the order reference to link to the parent order
4. Click **Bulk actions** > **Upload orders & line items**
5. Select **Choose orders file** and upload your orders file

6. Optionally, select **Choose line items file** and upload your line items file
7. Click **Upload** to import

Mill Certificate Upload

Getting your quality documentation into GoSmarter is equally straightforward:

1. Navigate to **Compliant Metals** > **Mill Certificates**
2. Click **Upload Mill Certificate**
3. Select **Choose file** and upload your completed file
4. GoSmarter's AI automatically extracts key information including:
5. Heat/batch numbers
6. Chemical composition
7. Test results
8. Review the extracted data
9. The certificate is now searchable and linked to your inventory

GoSmarter automatically reads your mill certificates and extracts the important data. What used to take 10-15 minutes of manual data entry now happens in seconds!

View detailed Mill Certificates Guide

Integration Options

GoSmarter works standalone, but can also integrate with your existing systems:

- **Standalone Use** - No integrations required; GoSmarter works perfectly on its own
- **Data Export** - Export your data anytime to Excel, CSV, or PDF for use in other systems
- **API Integration** - Connect to ERP or order management systems (contact support for details)

We recommend starting with GoSmarter as a standalone tool. You can always add integrations later once your team is comfortable with the platform.

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4. Orientation and Key Features Training

This section covers the essential features you'll use daily. We'll focus on quick wins and practical tasks.

Daily Operations Basics: Managing Inventory and Orders

Working with Inventory

Your inventory is the foundation of everything in GoSmarter. Here's what you need to know:

Viewing Your Stock:

1. Click **Inventory** in the main menu
2. See all your materials at a glance
3. Use filters to find specific items (by grade, size, location)
4. Click any item to see full details

Quick Exercise: Try adding a new material to your inventory right now using the manual entry option. This will help you get familiar with the interface.

Updating Stock Levels:

1. Find the item you want to update
2. Click the **Edit** icon (pencil)
3. Update the quantity
4. Click **Save**

GoSmarter's inventory management replaces clumsy spreadsheets with a simple, searchable interface. No more hunting through multiple Excel files!

View complete Inventory Management Guide

Managing Orders

Track customer orders from receipt to completion:

1. Go to **Orders** in the main menu
2. Click **+ New order** to add a new customer order
3. Enter order details (customer, materials needed, quantities, due date)
4. Track order status as it moves through production

View complete Order Management Guide

Compliance: Working with Mill Certificates

One of GoSmarter's most powerful features is instant access to quality documentation.

Step-by-Step Example: Upload and Retrieve a Certificate

1. **Upload:**
2. Go to **Mill Certificates**
3. Click **+ Upload Certificate**
4. Select your PDF certificate -
5. Click **Upload** and GoSmarter's AI extracts all key data automatically
6. **Search and Retrieve:**
7. Use the search bar to find certificates by:
    - File name
    - Date range
    - Status
8. Click on **Actions** > **View Certificate** to see the fully extracted document data
9. Download or email directly to customers

What used to take hours of searching through filing cabinets or folders now takes seconds. During audits or customer requests, you'll have instant access to all quality documentation.

Time Saved: Customers report saving **120+ hours per year** on certificate processing alone!

View complete Mill Certificates Guide

Production Planning: AI-Powered Optimisation

See GoSmarter's AI in action with production planning:

Quick Demo: Generate Your First Draft Cutting Plan

1. Go to **Production Planning** > **Cut Long Products**
2. Select the orders you want to plan
3. Choose available stock materials
4. Click **Generate Plan**
5. GoSmarter's AI creates an optimised cutting plan that:
6. Minimises scrap and waste
7. Shows exactly which bars to cut
8. Provides cut lists for the shop floor
9. Calculates material utilisation

This is where customers really see the power of AI. A task that might take hours manually is done in seconds enabling you to review / tweak the plan with your expertise

Real Results: Customers have achieved **50% scrap reduction** in rebar cutting using GoSmarter's optimisation.

Scrap Tracking

Keep track of waste and identify savings opportunities:

1. Navigate to **Production Planning** > **Scrap**
2. Log scrap by weight
3. Use insights to reduce waste over time

View Scrap Calculator Guide

You can use the main inventory tracker for scrap or offcuts where you need to maintain full traceability. Just set the inventory type to "scrap" or "offcut" when adding an item or split an existing item to create a new scrap/offcut item with all the existing properties of the original.

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5. First Week Action Plan

Follow this structured timeline to ensure successful onboarding and early wins:

Day 1: Setup and Initial Data

Tasks:

- [ ] Complete account setup and log in successfully
- [ ] Add 2-3 key team members
- [ ] Upload initial inventory data (start with current stock)
- [ ] Give us examples of mill certificates from any suppliers we don't currently have on the platform so we can add them to your company space
- [ ] Upload 5-10 recent mill certificates
- [ ] Complete a quick tour of all main sections

Expected Time: 2-3 hours

Goal: By end of Day 1, you should be able to log in, navigate the platform, and see your data in the system.

Day 2: First Production Tasks

Tasks:

- [ ] Enter 2-3 current customer orders
- [ ] Search for a mill certificate by heat number
- [ ] Update inventory quantities based on actual stock

Expected Time: 2-3 hours

Goal: Experience core workflows and see AI in action.

Day 3: Team Training

Tasks:

- [ ] Train 2-3 additional team members on logging in
- [ ] Show them how to check inventory
- [ ] Demonstrate certificate search
- [ ] Have them try basic tasks (view orders, search materials)

Expected Time: 1-2 hours

Goal: Build confidence across your team and distribute knowledge.

Day 4: Real-World Usage

Tasks:

- [ ] Use GoSmarter for all new orders received today
- [ ] Update inventory for any materials used
- [ ] Upload any new mill certificates
- [ ] Generate your first AI-powered cutting plan
- [ ] Review the plan with a colleague

Expected Time: Ongoing during normal work

Goal: Make GoSmarter part of your daily routine.

Day 5: Review and Reflect

Tasks:

- [ ] Hold a 30-minute team meeting to discuss:
- What time was saved this week?
- What problems were solved (e.g., found missing certificate data quickly)?
- Any questions or confusion?
- What features to explore next?
- [ ] Document any outstanding questions for support
- [ ] Plan next week's rollout to additional team members

Expected Time: 30-60 minutes

Goal: Celebrate early wins, address issues, and maintain momentum.

This structured approach helps you build confidence gradually. By Day 5, many customers have already freed several hours by eliminating manual paperwork and reducing planning time.

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6. Support and Resources

Getting Help

We're here to support your success!

Documentation:

- GoSmarter Documentation Home - All guides and tutorials
- Dashboard Guide - Understand your starting point
- Inventory Management Guide - Deep dive into stock tracking
- Order Management Guide - Master order workflows
- Mill Certificates Guide - Advanced certificate management
- Quick Reference Guide - Handy tips and shortcuts
- FAQ - Answers to common questions
- Troubleshooting Guide - Solve common issues

Customer Support:

- **Email Support:** support@gosmarter.ai
- **Response Time:** Within 24 hours on business days
- **Live Chat:** Available during business hours (coming soon)

Don't hesitate to reach out! Our team has deep experience in metal manufacturing and can help with setup, questions, or customization needs.

Customer Success Check-ins:

We recommend scheduling a check-in call with our customer success team after your first two weeks. We'll review your progress, answer questions, and help you get even more value from GoSmarter.

Common Onboarding Questions (FAQ)

Q: What if my inventory data is in an unusual format?
A: We can help guide you in transformaing data from other systems into the needed format. If you're having trouble, contact support and we can help you prepare your data or do a custom import.

Q: How secure is my data?
A: GoSmarter uses enterprise-grade security with encryption in transit and at rest. We follow industry best practices for data protection. Your data is stored securely in the cloud with regular backups.

Q: Can GoSmarter integrate with my ERP system?
A: GoSmarter works standalone but can integrate with many systems via our API. Contact our technical team to discuss your specific integration needs.

Q: What if I make a mistake entering data?
A: All data can be edited or deleted. We also maintain audit logs so you can see what changed and when. Don't worry - you can't break anything!

Q: Do I need special software or hardware?
A: No! GoSmarter is cloud-based and works in any modern web browser (Chrome, Firefox, Safari, Edge). No installation required.

Q: Can I export my data?
A: Yes! You can export data to CSV at any time. Your data is always yours.

Q: What happens when my trial ends?
A: You can choose a subscription plan that fits your needs. Your data and configuration are preserved - there's no disruption to your workflow.

User Community

Coming soon: user forum and community features

Join other GoSmarter users to share best practices, tips, and success stories.

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7. Conclusion and Next Steps

Congratulations!

By following this onboarding guide, you now have:

✅ GoSmarter set up and configured for your operation
✅ Your initial inventory and mill certificates in the system
✅ Knowledge of core features and daily workflows
✅ Team members trained on basic usage
✅ Real experience using AI-powered production planning

Immediate Benefits You're Already Seeing

- **Digitised certificates** - No more filing cabinet or inbox searches
- **Centralised inventory** - One source of truth for all stock data
- **Automated planning** - AI helps you do in minutes what used to take hours
- **Time savings** - Less paperwork means more time for productive work

Next Phase: Full Deployment

Now that you have the basics in place, you're ready to fully integrate GoSmarter into your operations.

Recommended Next Steps:

1. **Expand Usage** - Roll out GoSmarter to additional team members
2. **Explore Advanced Features** - Dive deeper into optimisation
3. **Optimise Workflows** - Customize GoSmarter to match your specific processes
4. **Measure Results** - Track time savings and efficiency gains

Additional Resources:

- **Implementation Project Plan** - Structured roadmap for full deployment (coming soon)
- **Process-Specific Guides:**
- Inventory Management Deep Dive
- Production Planning Best Practices
- Certificate Management Workflows
- Order Processing Optimization

Keep Learning

GoSmarter is designed to grow with you. As you become more comfortable with the basics, explore more features and advanced capabilities.

The most successful GoSmarter customers start simple and progressively add capabilities. There's no rush - focus on mastering the basics first, then expand when you're ready.

We're Here to Support Your Success

Remember, you're not alone in this journey. Our team is committed to your success:

- Comprehensive documentation and guides
- Responsive customer support
- Regular product updates and improvements
- A growing community of manufacturing professionals

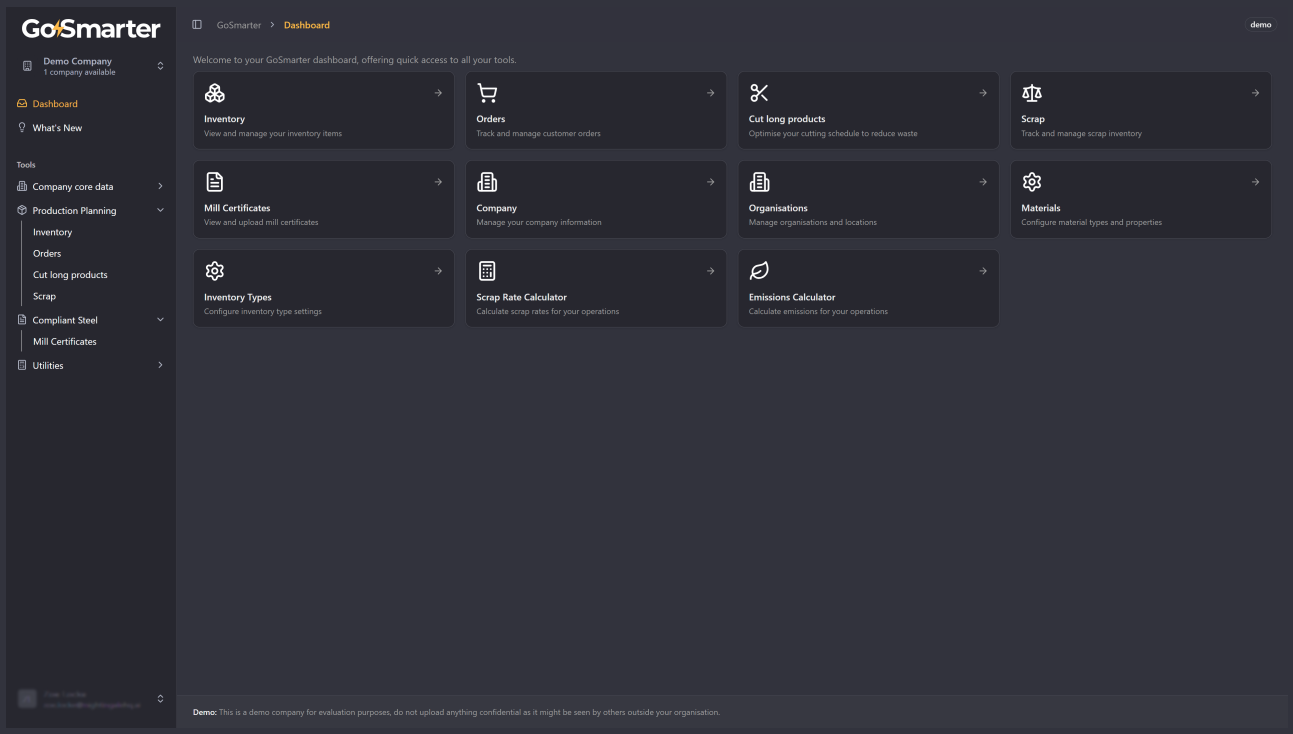
Ready to take the next step? Explore our process-specific guides or contact our customer success team to schedule a check-in call.

Welcome to the GoSmarter family! We're excited to be part of your journey toward more efficient, data-driven metal manufacturing.

You've already accomplished a lot in your first week. Keep building on this momentum - the more you use GoSmarter, the more value you'll discover. Many customers tell us they wonder how they ever managed without it!

Dashboard Overview

The Dashboard is the first page you see after logging in. It gives you a quick navigation to key areas of the GoSmarter system.



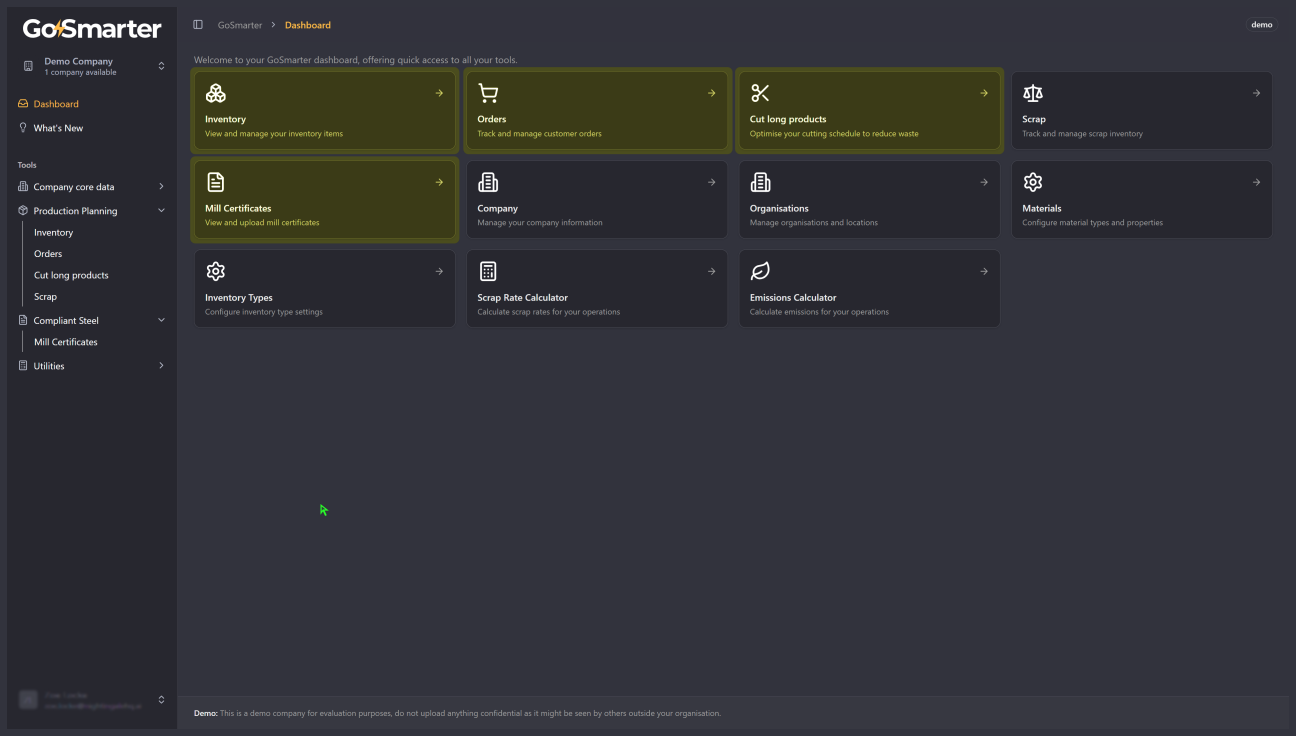
What You'll See

When you open the Dashboard, you'll see key information about your operation at a glance.

Main Dashboard Sections

The dashboard is designed to show you to the most important information first, so you can quickly access key tools such as:

- Inventory
- Orders
- Cutting jobs
- Mill certificates

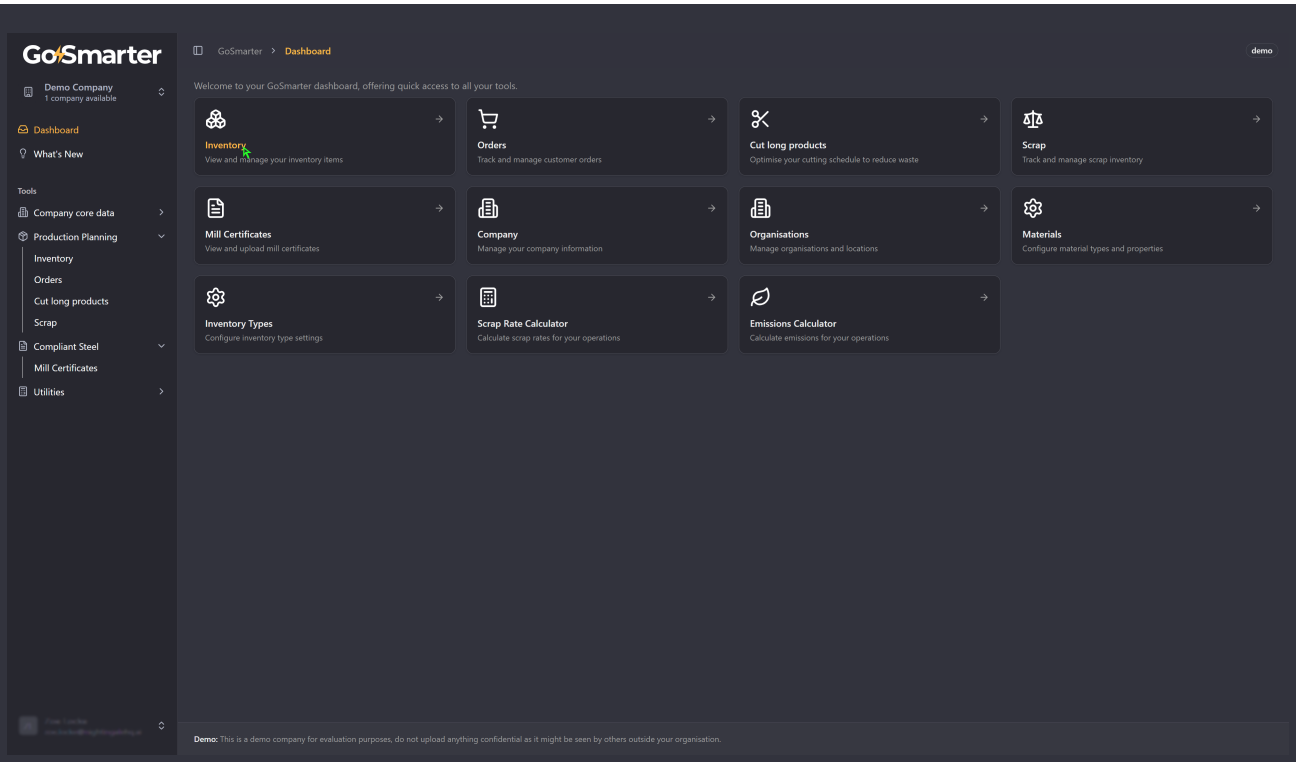


How to Use the Dashboard

Quick Navigation

From the dashboard, you can quickly jump to any section:

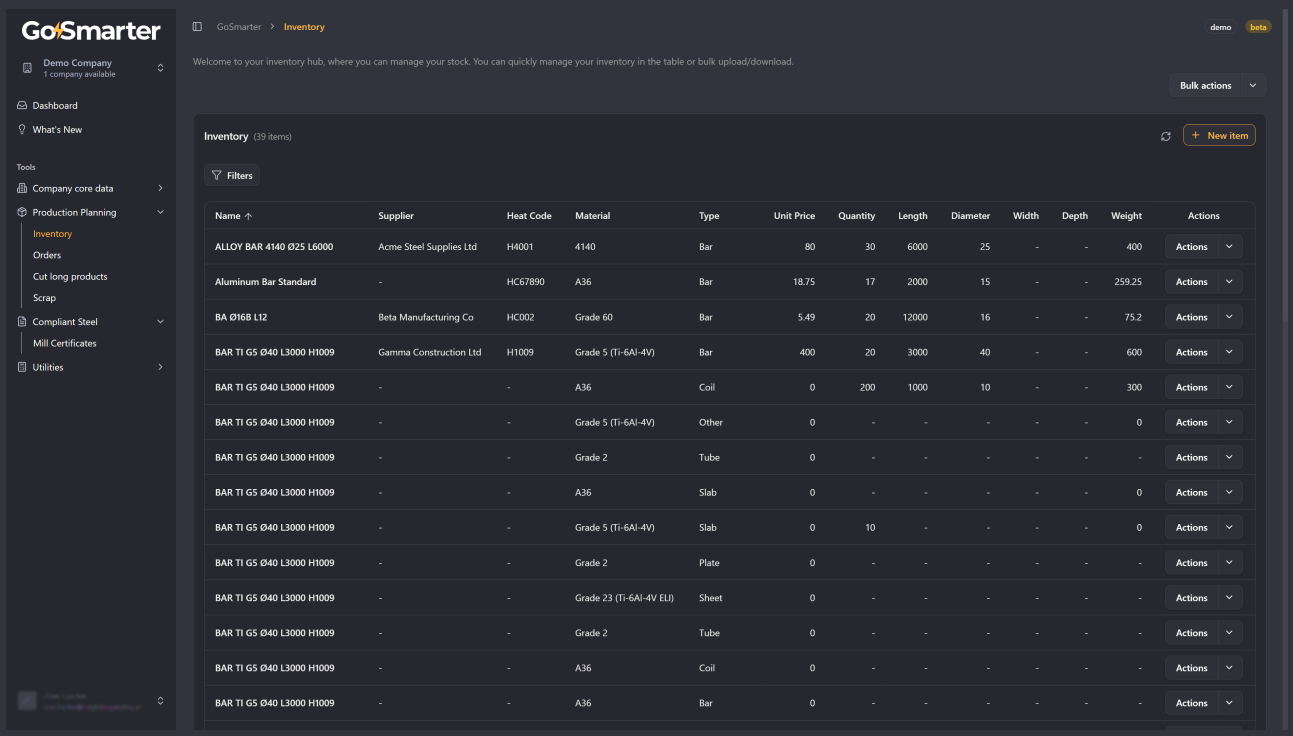
1. Click on any summary card to go to that section
2. Use the left sidebar menu to navigate directly
3. Recent items may have clickable links



Bookmark the dashboard page in your browser for quick access each day!

Inventory Management

The Inventory section helps you keep track of all the metal you have in stock. You can add new stock, update quantities, and view details about each bar.



Understanding Your Inventory

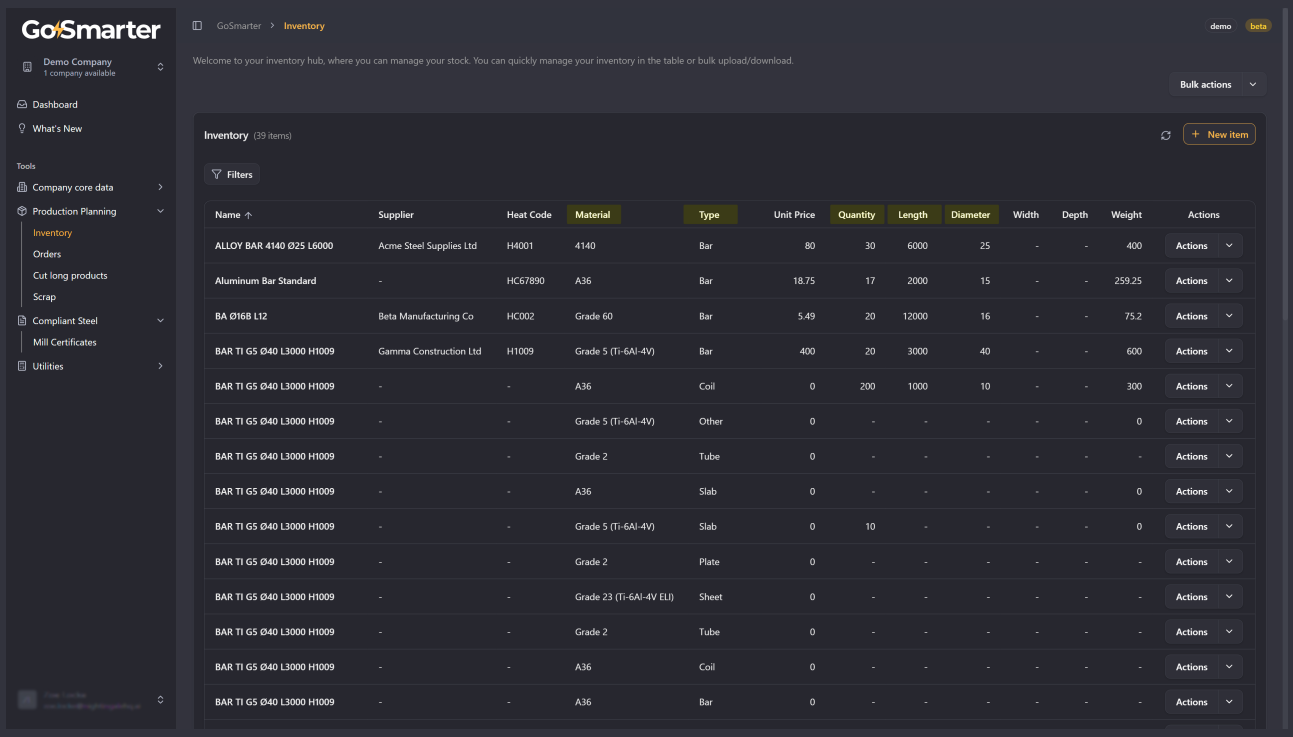
What You'll See

The Inventory page shows a table with all your steel bars. Each row represents a different type or batch of steel.

Common columns you'll see:

- **Material** - The type of metal (e.g., Steel Grade 250)
- **Diameter** - Thickness of the bar in millimeters
- **Length** - How long each bar is in millimeters
- **Quantity** - How many bars you have

- **Type** - Classification of the metal
- **Mill Certificate** - Associated quality certificate (if available)

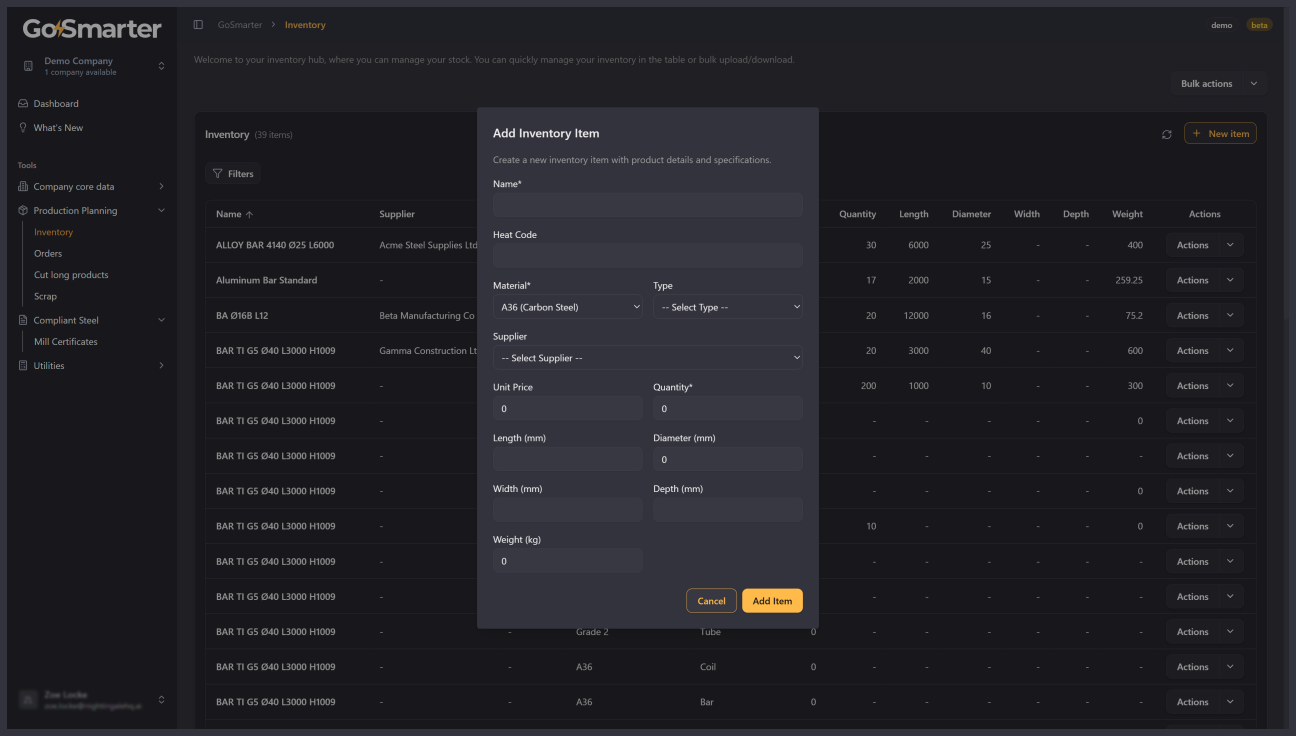


Adding Inventory

When new stock arrives at your facility, you need to add it to the system.

Adding a Single Item

1. Click the **+ Add Inventory** button at the top right
2. A form will appear
3. Fill in the details:
4. **Material** - Select the steel grade from the dropdown
5. **Type** - Choose the category
6. **Diameter** - Enter the bar diameter in mm
7. **Length** - Enter the bar length in mm
8. **Quantity** - How many bars you're adding
9. **Mill Certificate** (optional) - Link to the quality certificate
10. Click **Save** to add the inventory

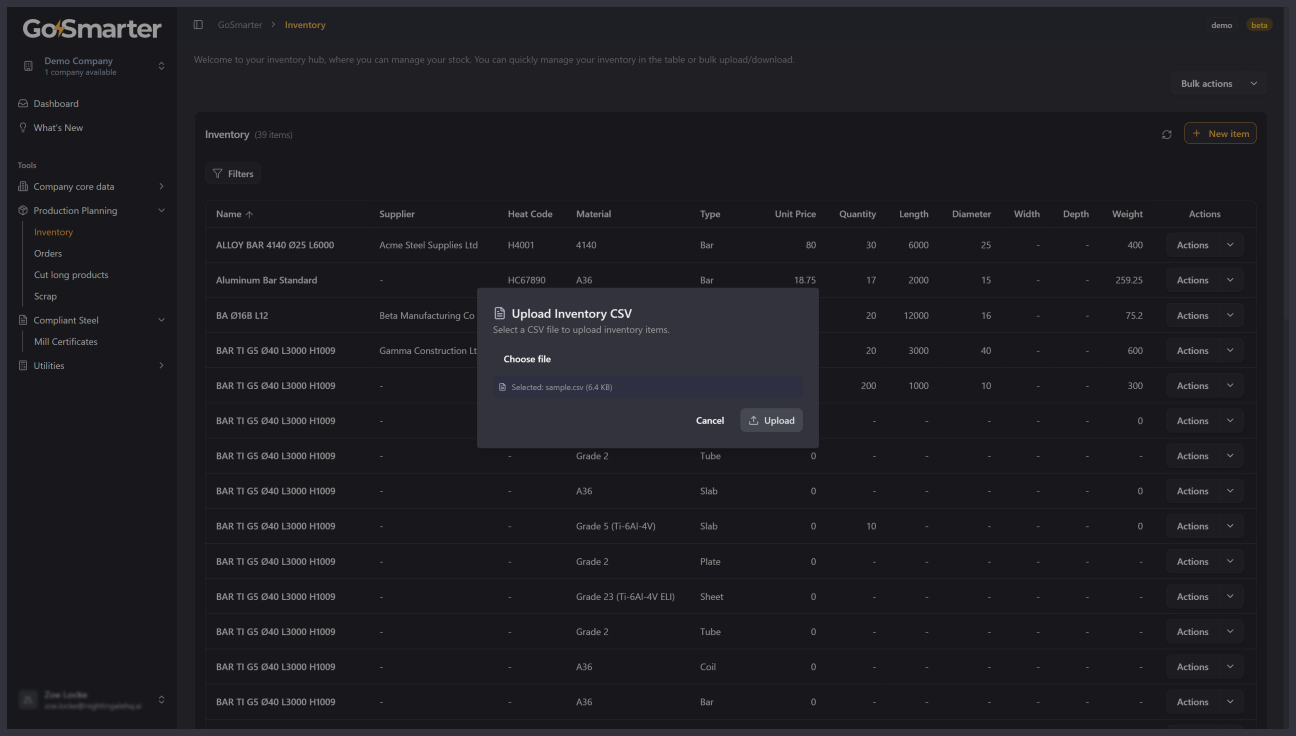


Double-check your numbers before saving, especially quantity and dimensions.

Uploading Multiple Items

If you have many items to add, you can upload them from a spreadsheet:

1. Click the **Upload** button
2. Download the template file if you don't have one
3. Fill in your spreadsheet with inventory details
4. Upload your completed file
5. Review the preview to make sure everything looks correct
6. Click **Confirm** to add all items



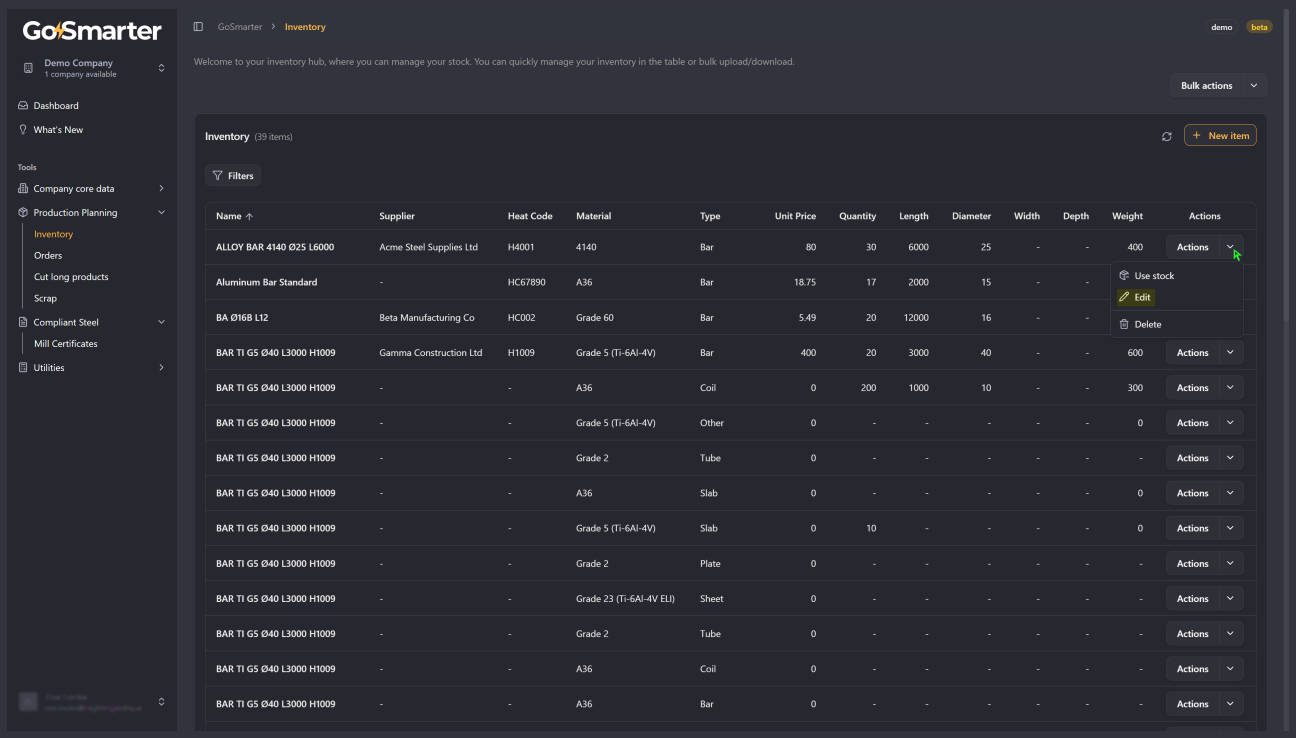
Keep a copy of your uploaded file for your records.

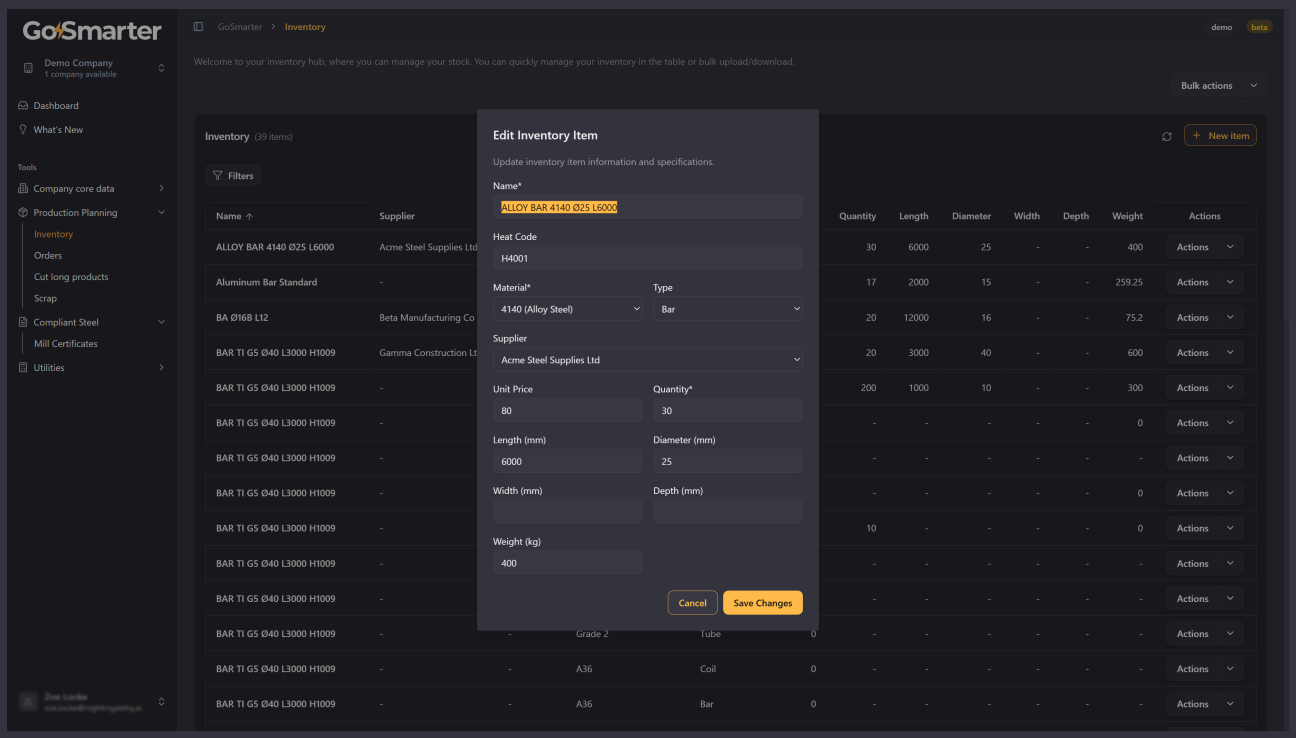
Updating Inventory

Editing an Item

When you need to change details or update quantities:

1. Find the item in your inventory list
2. Click the **Edit** button (pencil icon) on that row
3. Update the information you need to change
4. Click **Save**





Common updates:

- Adjusting quantity after usage
- Correcting entered information
- Adding a mill certificate reference

We don't allow decimal numbers for quantity. Please enter whole numbers only. If you have a piece of metal that should go back into stock but has different dimensions, add it as a new inventory item instead. You can categorise it as scrap or an offcut to track it's status.

Deleting an Item

If you need to remove an item completely:

1. Find the item in the list
2. Click the **Delete** button (trash icon)
3. Confirm you want to delete it
4. The item will be removed

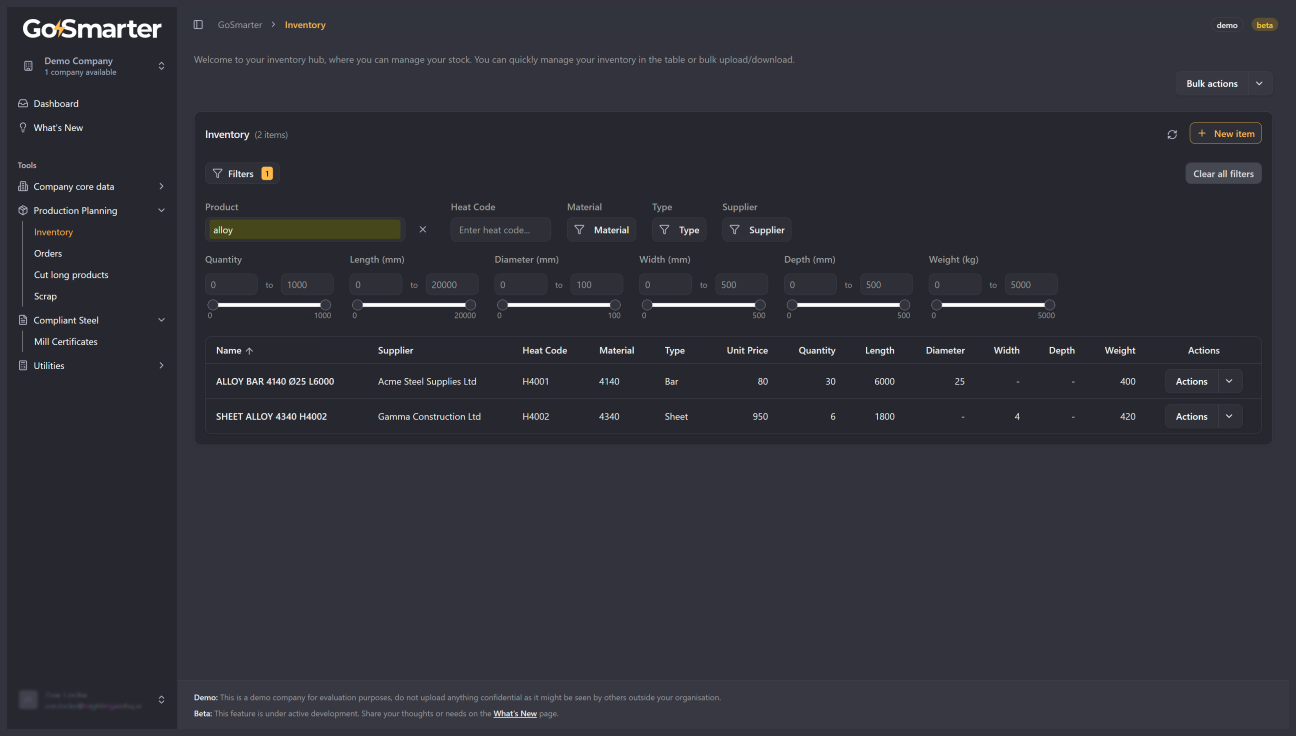
Deleted items cannot be recovered. Make sure you're deleting the correct item!

Searching and Filtering

When you have lots of inventory, finding specific items is important.

Using the Search Box

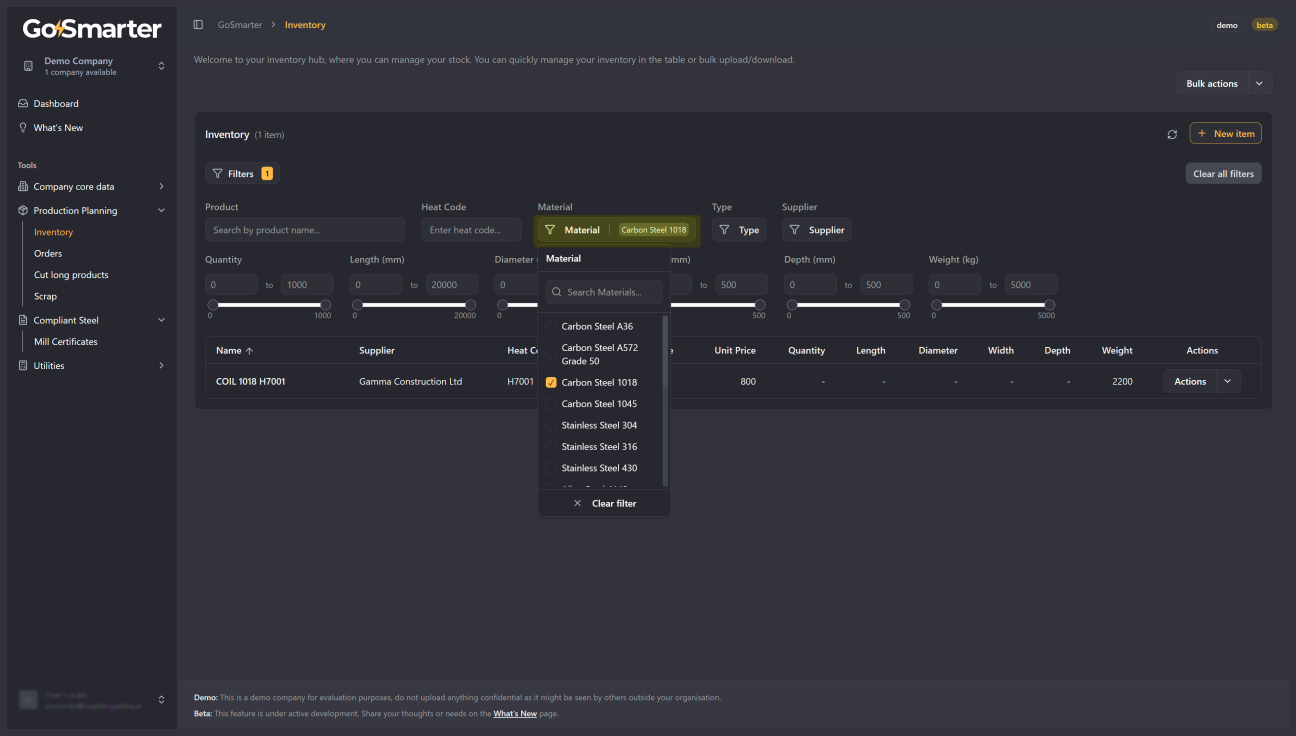
1. Look for the search box at the top of the inventory table
2. Type in what you're looking for:
3. Material grade (e.g., "Grade 250")
4. Diameter (e.g., "20")
5. Length (e.g., "12000")
6. The list will filter as you type



Using Filters

For more specific searching:

1. Click the **Filter** button
2. Select criteria:
3. Material type
4. Diameter range
5. Length range
6. Quantity available
7. Click **Apply**
8. Your list will show only matching items

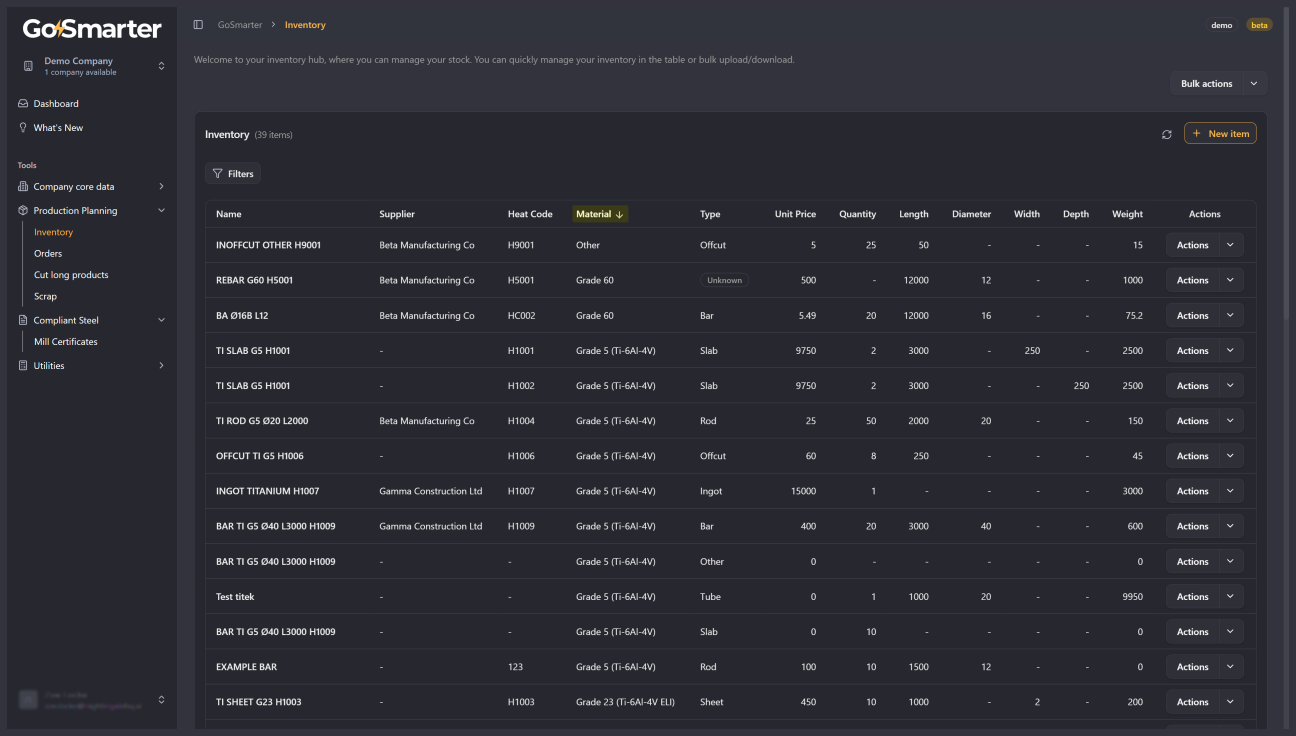


Clear your filters when you're done to see your full inventory again.

Sorting Your Inventory

You can organize your inventory list by clicking column headers:

1. Click any column header to sort by that column
2. Click again to reverse the order
3. Use this to:
4. See what's running low (sort by Quantity)
5. Group similar materials together (sort by Material)
6. Find longest or shortest bars (sort by Length)



Common Questions

What happens if I enter the wrong quantity?

You can edit the item and update the quantity at any time.

Can I see who added or changed inventory?

This is coming soon! Talk to us at feedback@nightingalehq.ai if you need this feature urgently.

How do I know when I'm running low on a material?

Sort by quantity to see items with low stock, or ask your administrator about setting up alerts.

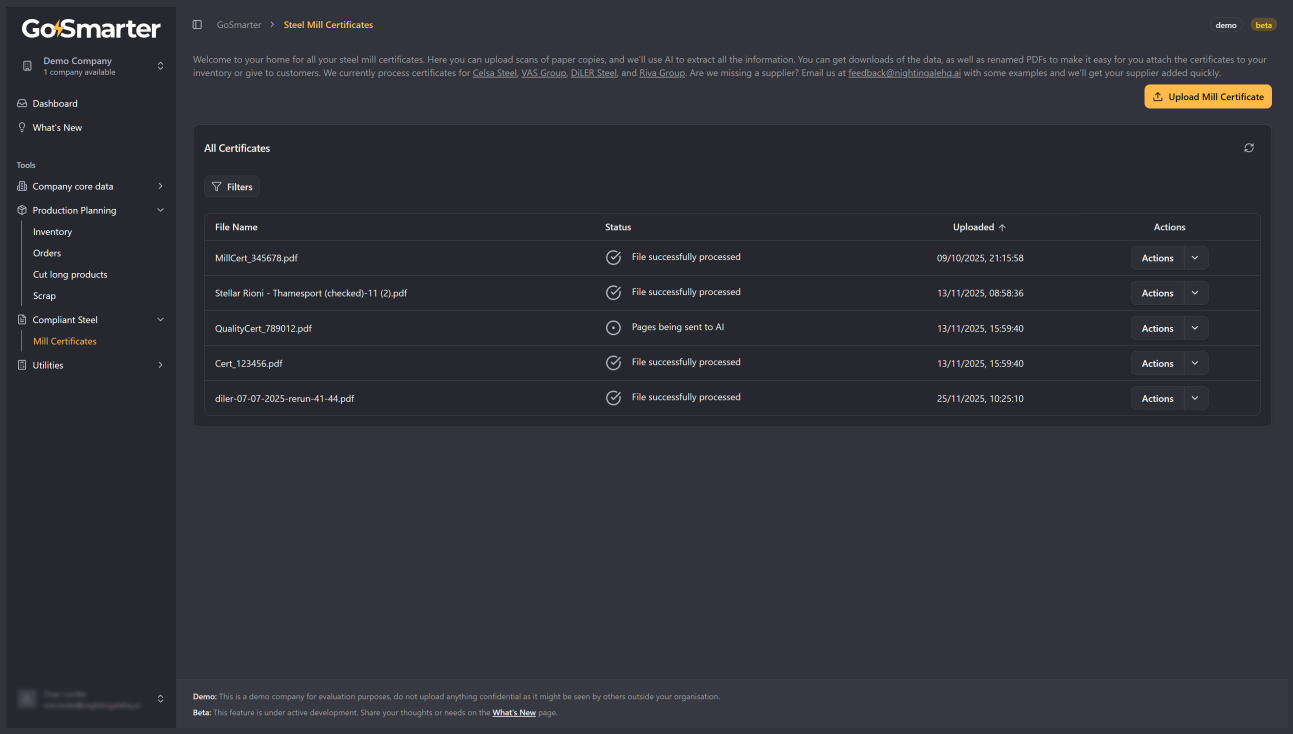
What if I receive the same material multiple times?

Add each delivery as a separate inventory item. This helps with traceability and mill certificate matching.

Accurate inventory is the foundation of efficient production planning!*

Mill Certificates

Mill certificates or Material Test Reports are quality documents that come with metal products. They prove the material meets certain standards and specifications.



What is a Mill Certificate?

A Mill Certificate (also known as a Material Test Report or MTR) is a certified quality document issued by the manufacturer (mill or foundry). It acts as the material's "birth certificate," providing a traceable record of its physical and chemical characteristics.

It typically includes:

- **Chemical Composition**: The precise percentage of elements (Carbon, Manganese, etc.) which determines properties like weldability and corrosion resistance.
- **Mechanical Properties**: Data from destructive testing, including tensile strength, yield strength, and elongation.
- **Heat Number**: A unique identifier linking the material back to the specific ladle of molten metal it came from. Also known as **Cast Number**, **Melt Number**, or **Lot Number**.

- **Product Specifications**: Confirmation that the material meets specific standards (e.g., ASTM, EN, ISO).
- **Dimensions and Weight**: Specifics of the material batch covered by the report.

Size (mm)	Length (m)	Heat Number	No. of Bundle	Mass per meter (kg/m)	Actual Weight (mts)	C (%)	Si (%)	Mn (%)	P (%)	S (%)	Cr (%)	Ni (%)	Cu (%)	N (%)	Al (%)	CEV	Yield Point (N/mm²)	Tensile strength (N/mm²)	Ratio of tensile and yield	Elong Agt (%)	Rebend	Bend Test
25	12	N252C0866	9	3.850	22.39	0.20	0.21	0.84	0.024	0.025	0.23	0.07	0.19	0.0078	0.003	0.41	548	652	1.19	10.2	Pass	Pass
																	559	658	1.18	10.2	Pass	Pass
																	547	636	1.16	10.3	Pass	Pass
25	12	N252C0867	9	3.850	22.41	0.22	0.23	0.85	0.030	0.024	0.23	0.07	0.20	0.0070	0.001	0.43	552	631	1.14	10.5	Pass	Pass
																	537	663	1.23	10.2	Pass	Pass
																	549	667	1.21	10.1	Pass	Pass
25	12	N252C0869	1	3.850	2.49	0.19	0.24	0.92	0.030	0.020	0.27	0.08	0.22	0.0050	0.001	0.42	566	655	1.16	10.2	Pass	Pass
																	558	648	1.16	10.2	Pass	Pass
																	563	651	1.16	10.1	Pass	Pass
25	12	N252D0852	20	3.850	49.66	0.19	0.27	0.87	0.023	0.024	0.19	0.08	0.19	0.0078	0.002	0.40	555	639	1.15	10.1	Pass	Pass
																	554	638	1.15	10.3	Pass	Pass
																	557	643	1.15	10.2	Pass	Pass
25	12	N252D0853	18	3.850	44.64	0.21	0.26	0.91	0.024	0.030	0.26	0.10	0.20	0.0060	0.002	0.44	560	659	1.18	10.1	Pass	Pass
																	568	662	1.17	10.0	Pass	Pass
																	564	665	1.18	10.3	Pass	Pass
25	12	N252D0854	14	3.850	34.83	0.17	0.23	0.83	0.024	0.026	0.19	0.07	0.20	0.0080	0.002	0.37	555	644	1.16	10.1	Pass	Pass
																	538	618	1.15	10.4	Pass	Pass
																	541	623	1.15	10.4	Pass	Pass
25	12	N252D0855	19	3.850	47.15	0.18	0.26	0.88	0.027	0.020	0.20	0.06	0.19	0.0070	0.001	0.39	560	651	1.16	10.2	Pass	Pass
																	567	652	1.15	10.1	Pass	Pass
																	564	651	1.15	10.2	Pass	Pass
25	12	N252D0856	1	3.850	2.49	0.21	0.23	0.82	0.026	0.019	0.22	0.06	0.21	0.0050	0.001	0.41	566	663	1.17	10.5	Pass	Pass
																	561	662	1.18	10.3	Pass	Pass
																	563	664	1.18	10.3	Pass	Pass
25	12	N252E0861	16	3.850	39.63	0.20	0.21	0.80	0.024	0.025	0.22	0.08	0.20	0.0066	0.002	0.40	560	651	1.16	10.2	Pass	Pass
																	561	640	1.14	10.0	Pass	Pass
																	557	645	1.16	10.2	Pass	Pass
25	12	N252E0862	20	3.850	49.64	0.20	0.22	0.87	0.025	0.024	0.22	0.08	0.21	0.0090	0.002	0.42	572	659	1.15	10.0	Pass	Pass
																	569	657	1.15	10.2	Pass	Pass
																	566	651	1.15	10.3	Pass	Pass
25	12	N252E0863	17	3.850	42.30	0.19	0.22	0.83	0.022	0.021	0.19	0.07	0.16	0.0050	0.002	0.39	552	641	1.16	10.3	Pass	Pass
																	560	641	1.14	10.3	Pass	Pass
																	555	641	1.15	10.3	Pass	Pass

Why they matter

Mill certificates are not just paperwork; they are critical for:

- **Traceability**: In the event of a product failure, you must be able to trace the material back to its source.
- **Compliance & Audits**: ISO 9001 and EN 1090 standards often strictly require valid MTRs for all structural materials.
- **Customer Requirements**: Many projects, especially in construction and aerospace, formally mandate that MTRs be submitted before materials are accepted.
- **Verification**: Ensuring you actually received the grade of material you paid for (e.g., ensuring S355 wasn't swapped for S275).

Learn More about Digital Management

To learn how automation and AI can streamline mill certificate management, check out these articles:

- How to Automate Mill Certificate Management in 5 Steps
- Mill Test Certificate Management: Common Questions

Viewing Your Certificates

The main page shows all your processed mill certificates in a table.

What you'll see

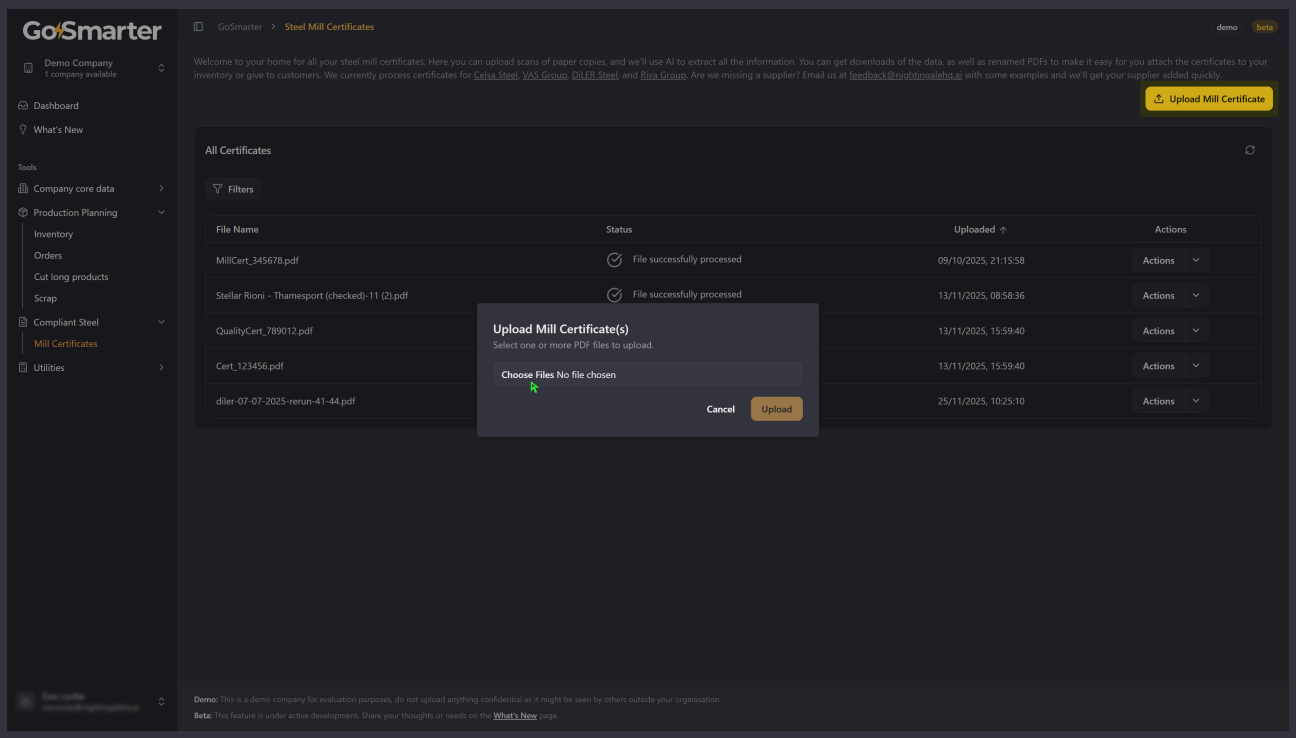
- **File name** - The file uploaded (useful to have a clear naming convention)
- **Heat/Batch Number** - Production batch identifiers identified on the certificate
- **Date Uploaded** - When the certificate was uploaded
- **Status** - Uploaded, verified, or linked to inventory

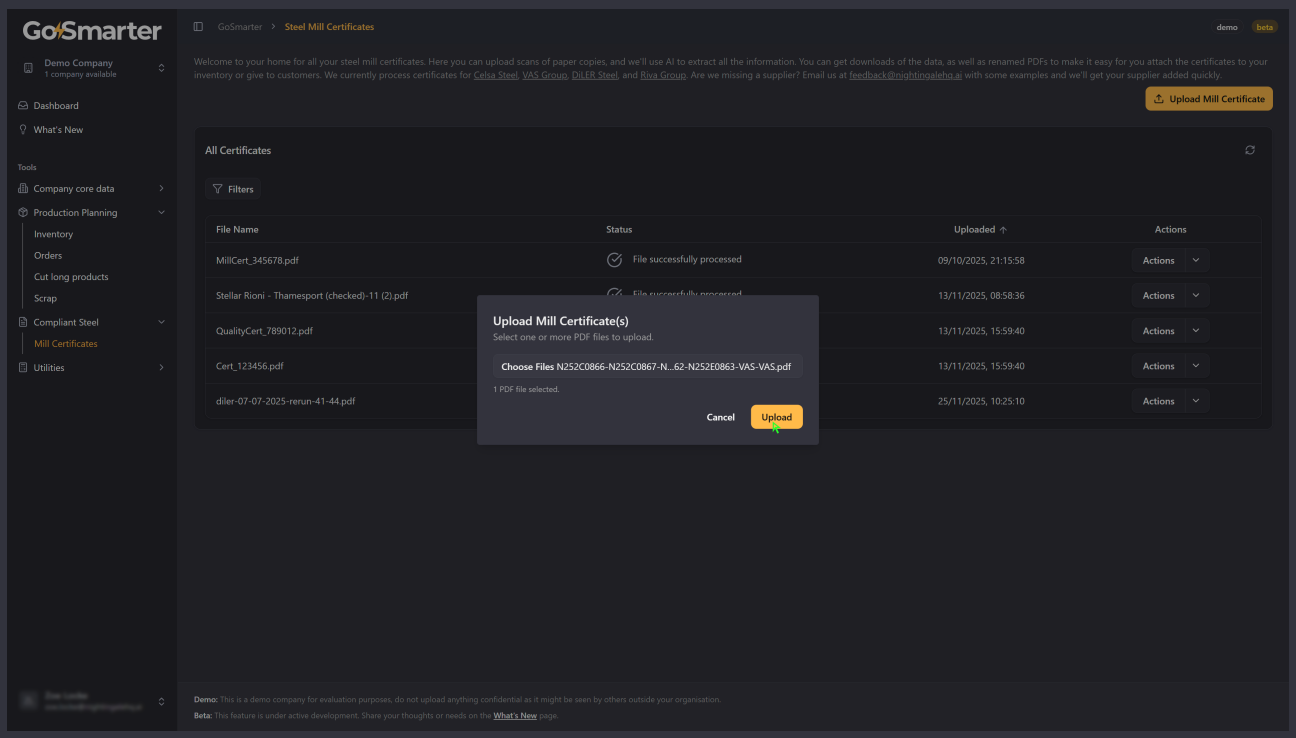
Uploading Certificates

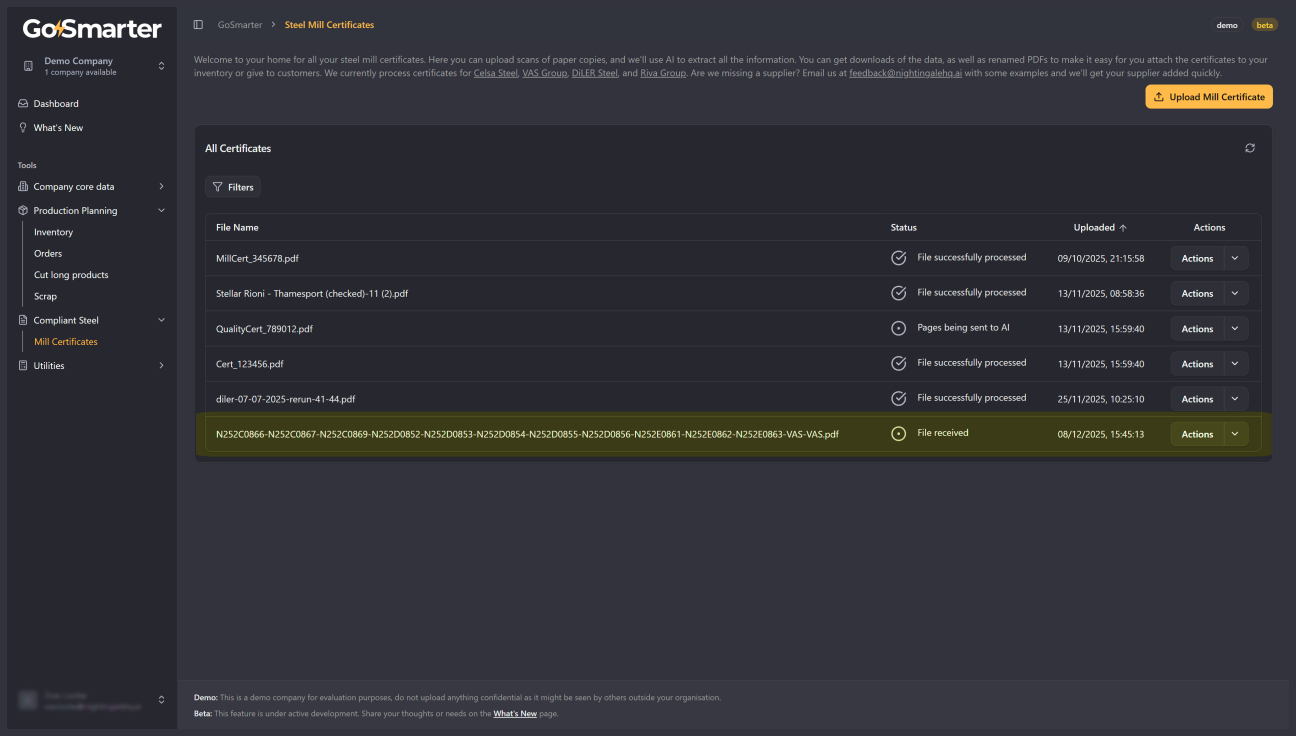
Uploading a Single Certificate

When you receive a certificate:

1. Click the **+ Upload Certificate** button
2. A form appears
3. Click to select the certificate file (PDF or image)
4. Click **Upload**


GoSmarter
GoSmarter > Steel Mill Certificates
demo
beta
Demo Company
1 company available
Dashboard
What's New
Tools
Company core data
Production Planning
Inventory
Orders
Cut long products
Scrap
Compliant Steel
Mill Certificates
Utilities
Welcome to your home for all your steel mill certificates. Here you can upload scans of paper copies, and we'll use AI to extract all the information. You can get downloads of the data, as well as renamed PDFs to make it easy for you attach the certificates to your inventory or give to customers. We currently process certificates for Celsa Steel, VAS Group, DiLER Steel, and Riva Group. Are we missing a supplier? Email us at feedback@nightingaleha.ai with some examples and we'll get your supplier added quickly.
Upload Mill Certificate
All Certificates
Filters
File Name
Status
Uploaded
Actions
MillCert_345678.pdf
File successfully processed
09/10/2025, 21:15:58
Stellar Rioni - Thamesport (checked)-11 (2).pdf
13/11/2025, 08:58:36
QualityCert_789012.pdf
13/11/2025, 15:59:40
Cert_123456.pdf
13/11/2025, 15:59:40
diler-07-07-2025-rerun-41-44.pdf
25/11/2025, 10:25:10
Upload Mill Certificate(s)
Select one or more PDF files to upload.
Choose Files No file chosen
Cancel
Upload
Demo: This is a demo company for evaluation purposes, do not upload anything confidential as it might be seen by others outside your organisation.
Beta: This feature is under active development. Share your thoughts or needs on the What's New page.


GoSmarter
GoSmarter > Steel Mill Certificates
demo
beta
Demo Company
1 company available
Dashboard
What's New
Tools
Company core data
Production Planning
Inventory
Orders
Cut long products
Scrap
Compliant Steel
Mill Certificates
Utilities
Welcome to your home for all your steel mill certificates. Here you can upload scans of paper copies, and we'll use AI to extract all the information. You can get downloads of the data, as well as renamed PDFs to make it easy for you attach the certificates to your inventory or give to customers. We currently process certificates for Celsa Steel, VAS Group, DiLER Steel, and Riva Group. Are we missing a supplier? Email us at feedback@nightingaleha.ai with some examples and we'll get your supplier added quickly.
Upload Mill Certificate
All Certificates
Filters
File Name
Status
Uploaded
Actions
MillCert_345678.pdf
File successfully processed
09/10/2025, 21:15:58
Stellar Rioni - Thamesport (checked)-11 (2).pdf
13/11/2025, 08:58:36
QualityCert_789012.pdf
13/11/2025, 15:59:40
Cert_123456.pdf
13/11/2025, 15:59:40
diler-07-07-2025-rerun-41-44.pdf
25/11/2025, 10:25:10
Upload Mill Certificate(s)
Select one or more PDF files to upload.
Choose Files N252C0866-N252C0867-N...62-N252E0863-VAS-VAS.pdf
1 PDF file selected.
Cancel
Upload
Demo: This is a demo company for evaluation purposes, do not upload anything confidential as it might be seen by others outside your organisation.
Beta: This feature is under active development. Share your thoughts or needs on the What's New page.



Keep the original filename clear, like "Cert-123456-Grade500.pdf" for easy identification.

Accepted File Types

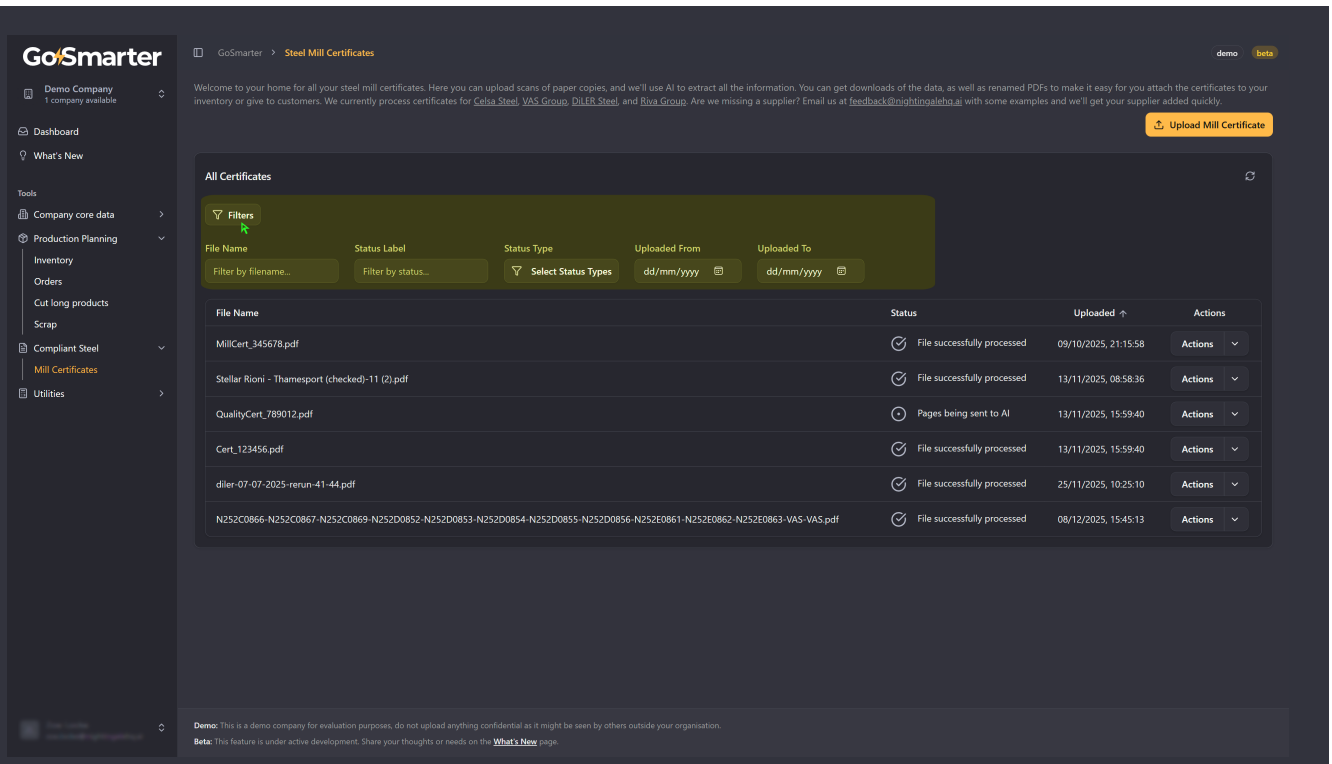
You can upload PDFs.

Searching for Certificates

Using Search and Filters

For more targeted searching:

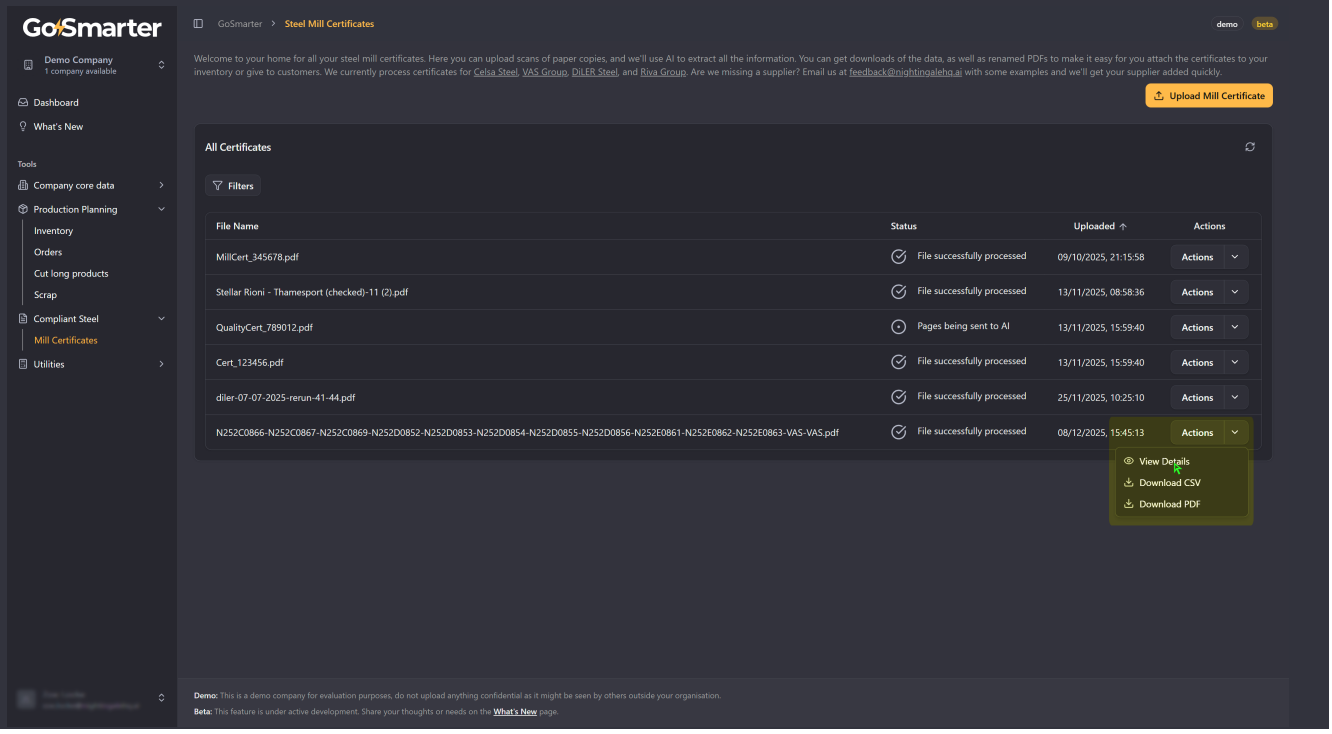
1. Click the **Filter** button
2. Type into a text field to search, or use the filter fields:
3. **File name** - Show only specific files
4. **Date Range** - Certificates uploaded in a certain period
5. **Heat code** - Find a specific heat or batch number
6. **Status** - File processing status

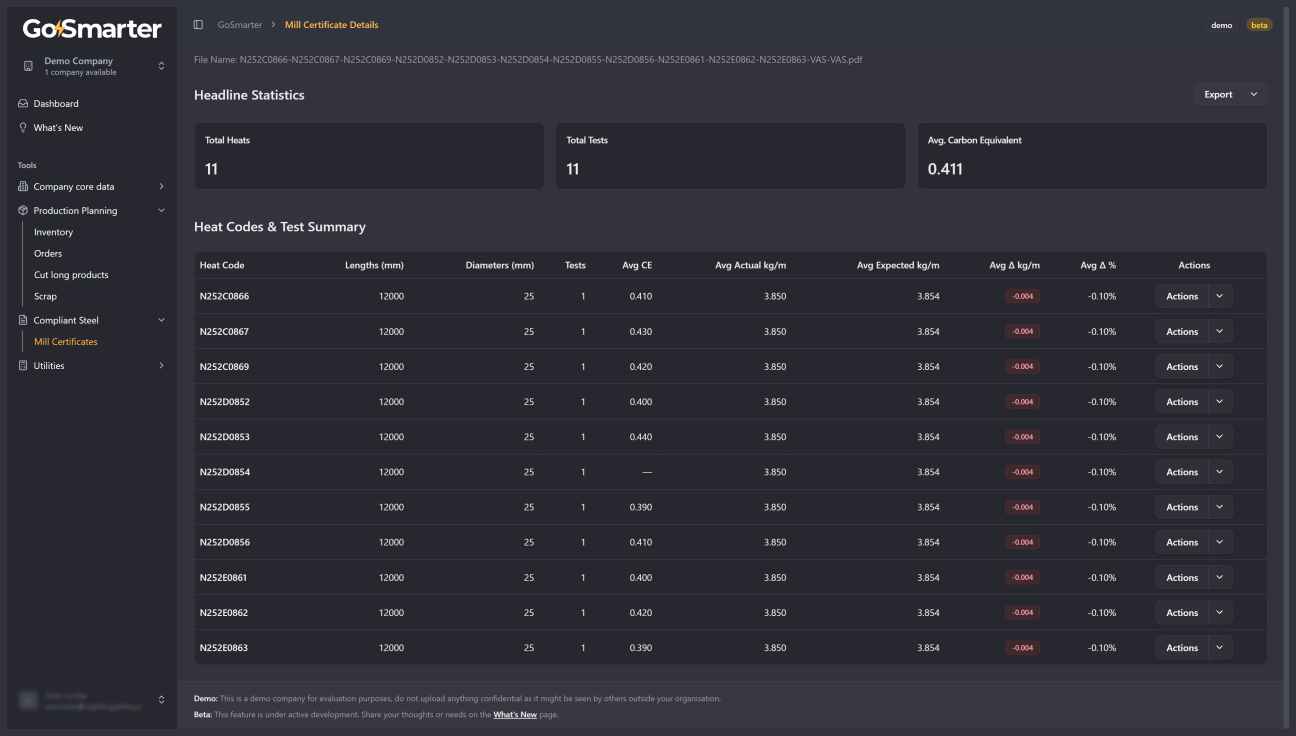


Viewing Certificate Details

To see or download a certificate

1. Click on any certificate row
2. The detail page opens





What you'll see

- Top-level certificate details
- One row per heat or batch number
- Export button

Downloading a Certificate

To save or print:

1. Open the certificate details or from the list
2. Click the Actions button and select a **Download** option a. Download the underlying data from the certificate(s) as a CSV file b. Download a Zip file containing each page of the certificate as separate PDF with a name based on the heat/batch number(s) present on the page c. Download a Zip file containing a PDF per heat/batch number present in the certificate
3. Open it with your PDF reader or image viewer

Download certificates when you need to send them to customers or inspectors.

Linking Certificates to Inventory

When material arrives with a certificate, the two will automatically be linked, so you don't have to.

When Inventory is Added

Add the heat code for the inventory item when you create or update the invetnory record. If a matching certificate exists, it will be linked automatically. This is checked every time inventory is loaded on screen so as soon as heat code shows up in an uploaded certificate hte link happens.

When you upload a Certificate

The system extracts and stores all relevant heat codes from the certificate. If any inventory items already exist with matching heat codes, they will be linked automatically. This is checked every time a certificate is uploaded.

Links are created based on heat codes only. Make sure the heat code in inventory matches exactly what is on the certificate. Note, this is case insensitive i.e. abc is the same as ABC.

Managing Certificates

Editing Certificate Information

At this time, you cannot edit certificate details once uploaded. If information is incorrect, delete and re-upload the correct file.

Deleting Certificates

Due to the retention of audit trails, you cannot delete certificates.

Leaving the platform

If you stop using GoSmarter you can request your data be deleted. Contact support for assistance.

Certificate Status

Certificates can have different statuses:

- **Processing** - File is in the system but has not been fully processed yet
- **Complete** - Information has been successfully extracted
- **Error** - Something went wrong during processing and we need to re-process the file

Common Questions

What if I have a paper certificate?

Scan it or take a clear photo, then upload the image file. PDF scans work best.

Can I upload the same certificate twice?

You can, but it's better to use unique certificate numbers to avoid confusion.

What if the certificate covers multiple batches?

Upload it once and it will link to all relevant inventory items.

How long should I keep certificates?

Keep them as long as you have the material in stock, and for several years after for audit purposes. Check your industry regulations.

What if a customer requests a certificate?

Search for it, view the details, download the file, and send it to them.

Can I bulk upload certificates?

We don't recommend uploading more than 30-40 pages of certificates at once to avoid processing delays. Upload in smaller batches if needed. Each file should include certificates from a single supplier.

Best Practices

1. **Upload immediately** - Don't let certificates pile up; upload them when deliveries arrive
2. **Use clear naming** - Name files descriptively before uploading
3. **Link to inventory** - Always update your inventory with heat codes to ensure automatic linking
4. **Verify information** - Double-check certificate numbers and heat numbers
5. **Keep originals** - Store paper originals in a safe place as backup
6. **Regular audits** - Periodically check that recent inventory has certificates
7. **Customer ready** - Keep certificates organised so you can quickly respond to requests

Next Steps

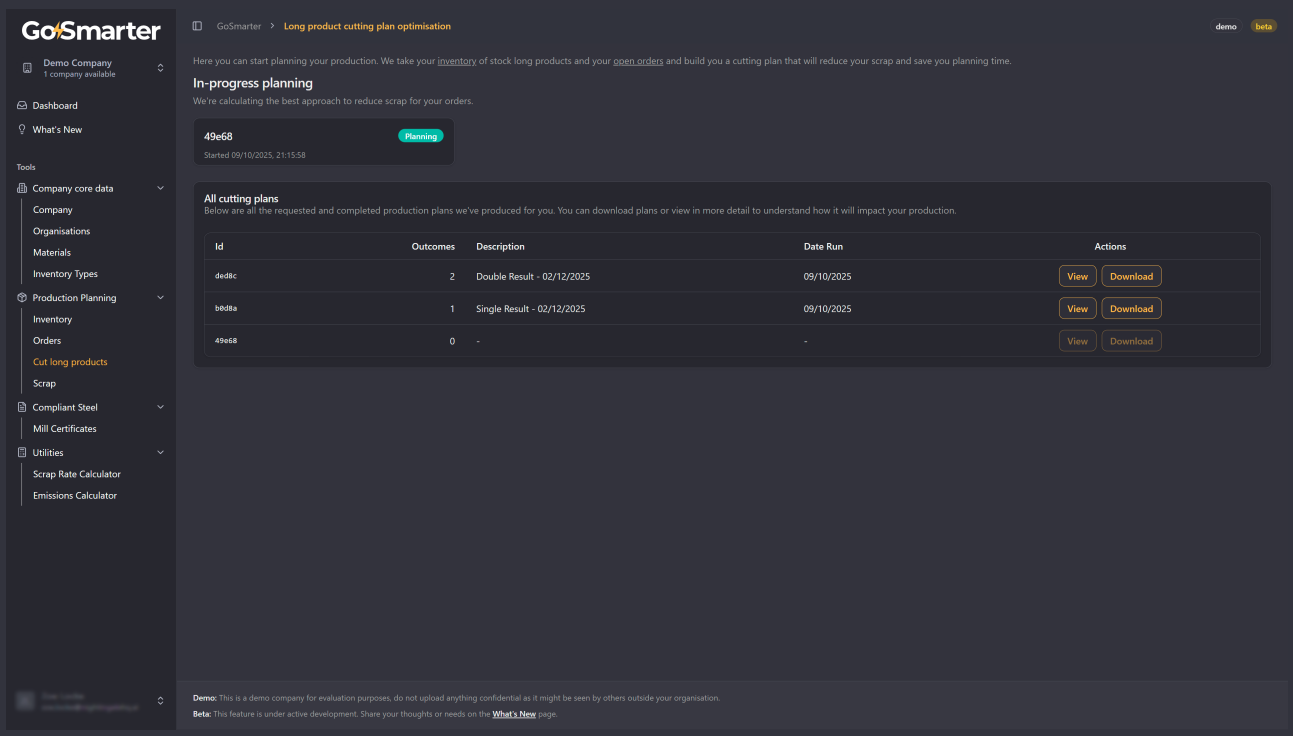
With certificates organised:

- Link to inventory - Connect certificates to your stock
- Use for customer inquiries - Reference when customers need documentation
- Regular compliance - Have certificates ready for quality audits

Proper certificate management ensures compliance and customer confidence!

Cut Long Products (Optimization)

The Cut Long Products section (also called Optimization) helps you plan how to cut your steel bars efficiently. This reduces waste and saves money by finding the best way to cut what you need from what you have.



What is Cutting Optimization?

When you have long steel bars in inventory and need to cut them into shorter pieces for orders, there are many ways to do it. Some ways waste more material than others.

The optimization tool automatically finds the best cutting pattern that:

- Uses the bars you have in stock
- Produces the pieces customers ordered
- Creates the least amount of waste
- Minimizes the number of cuts needed

Example:

If you have 12-meter bars and need pieces that are 3.5 meters and 4 meters long, the system figures out how to cut them to waste as little as possible.

Viewing Your Cutting Plans

The main page shows all your optimization runs (cutting plans).

What you'll see

- **Name** - Description of the cutting plan
- **Date Created** - When you ran it
- **Status** - Complete, in progress, or failed
- **Waste %** - How much material will be unused
- **Actions** - View details, download, delete

Running Optimization

Step 1: Prepare Your Data

Before running optimization, make sure you have:

1. ✅ Current inventory entered in the system
2. ✅ Orders entered with correct quantities and lengths
3. ✅ Matching material types and diameters

The optimizer can only use bars you have in inventory to fulfill orders you've entered.

Step 2: Start a New Optimization

1. Click the **+ New Optimization** button
2. A setup form appears

Step 3: Select What to Include

Choose what inventory and orders to use:

Inventory Selection

- Select the material grade (e.g., Grade 250)
- Select the diameter (e.g., 20mm)
- The system shows you how many bars you have available

Orders Selection

- Select which orders to include in this cutting plan
- Check the order numbers and quantities
- You can select multiple orders at once

Step 4: Run the Optimization

1. Give your optimization run a clear name (e.g., "Order 101-105 Grade 250 20mm")
2. Click **Run Optimization**
3. The system calculates the best cutting pattern
4. This usually takes 10-30 seconds

Step 5: Wait for Results

A progress indicator shows the optimization is working. When complete, you'll see:

- ✅ Success message
- Results summary
- Option to view details

Understanding Results

Viewing the Cutting Plan

1. Click on a completed optimization from the list
2. The details page opens

Summary Section

- Total bars to cut
- Total pieces produced
- Waste percentage
- Material utilization

Cutting Patterns

Each pattern shows:

- Which bar from inventory to use (by position/ID)
- What lengths to cut from it
- How many times to repeat this pattern
- Waste remaining from each bar

Reading a Cutting Pattern

Example pattern:

```
Bar #1 (12,000mm) → Cut: 3,500mm, 3,500mm, 4,000mm = 11,000mm used
Waste: 1,000mm (8.3%)
Repeat this pattern: 5 times
```

This means:

- Take bar #1 from your inventory
- Cut one piece 3,500mm long
- Cut another piece 3,500mm long
- Cut one piece 4,000mm long

- You'll have 1,000mm left over as waste
- Do this same pattern on 5 different bars

Downloading Results

Downloading the Cutting Plan

To save the plan or print it for the production floor:

1. Open the optimization details
2. Click the **Download** button
3. Choose format:
4. **Excel** - Spreadsheet with all patterns
5. **PDF** - Printable cutting instructions
6. The file downloads to your computer

Print the PDF and give it to the operator who will be cutting the bars.

What's in the Download

The downloaded file includes:

- List of bars to use (by inventory reference)
- Exact cutting measurements for each pattern
- How many pieces of each length to produce
- Total waste calculation
- Summary statistics

Comparing Optimizations

If you want to try different approaches:

1. Run optimization with different inventory selections
2. Run optimization with different order combinations

3. Compare waste percentages
4. Use the plan with the lowest waste

Example:

- Run 1: Using only 12-meter bars = 12% waste
- Run 2: Using mix of 12-meter and 6-meter bars = 7% waste
- Choose Run 2 - saves material!

Managing Your Optimizations

Renaming an Optimization

1. Click the **Edit** button (pencil icon)
2. Change the name to something more descriptive
3. Click **Save**

Good naming examples:

- "Week 42 Grade 500 16mm"
- "Customer ABC Order 101-103"
- "Urgent Orders Oct 21"

Deleting Old Optimizations

To keep your list clean:

1. Find optimizations you no longer need
2. Click the **Delete** button (trash icon)
3. Confirm deletion

Deleted optimizations cannot be recovered. Download them first if you might need them later.

Common Questions

What if the optimization can't use all my inventory?

The system only uses bars that can efficiently produce the required pieces. Leftover inventory stays in your stock.

What if I don't have enough inventory to fulfill my orders?

The optimization will show what it can do with available inventory. You'll need to get more stock for the remaining orders.

Can I adjust the cutting patterns manually?

The patterns are optimized by the system. If you need different patterns, try running optimization with different inventory or order selections.

How accurate is the waste calculation?

Very accurate. However, add a small allowance for saw blade width (kerf) when cutting in real production.

Can I save multiple optimization runs?

Yes! Keep different scenarios saved so you can compare them and choose the best approach.

What if two patterns have similar waste percentages?

Other factors matter too: number of cuts, bar handling, operator convenience. Choose what works best for your situation.

Tips for Best Results

1. **Keep inventory accurate** - The optimizer can only work with what it knows you have
2. **Group similar orders** - Optimizing orders with the same material together gets better results

3. **Consider bar handling** - Sometimes a plan with slightly more waste but fewer cuts is more practical
4. **Save your plans** - Keep successful plans for reference when similar orders come in
5. **Download before cutting** - Always have a printed plan for the shop floor

---

Next Steps

With your cutting plan ready:

- Update inventory - Mark bars as used after cutting
- Update orders - Change status to "In Progress" or "Complete"
- Calculate scrap rate - Verify waste percentages

Smart cutting planning saves material, time, and money!

Managing Inventory and Daily Operations with GoSmarter

This guide is designed for inventory managers, store personnel, and operations managers responsible for stock control and daily operational data. Learn how to use GoSmarter's Inventory Management capabilities to track materials, suppliers, and orders in one place, replacing manual inventory spreadsheets with GoSmarter's simpler, real-time interface.

Overview

The Challenge

Managing inventory in metals manufacturing traditionally involves juggling multiple spreadsheets, manual stocktakes, and disconnected systems. Finding out what raw materials are on hand, where they are located, and allocating them to jobs can be time-consuming and error-prone.

How GoSmarter Helps

GoSmarter provides a centralised, real-time inventory management system that:

- Tracks all materials, suppliers, and orders in one place
- Provides instant visibility into current stock levels
- Links mill certificates to inventory items for full traceability
- Enables multiple team members to access data simultaneously
- Reduces inventory errors and saves time compared to manual checking

GoSmarter can be used standalone or alongside existing systems. Benefits include less inventory error, significant time savings vs. manual checking, and improved traceability for compliance.

Navigating the Inventory Module

When you open the Inventory section, you'll see the Inventory dashboard - your central hub for all stock management activities.

Adding and Updating Stock Items

Adding New Stock

When new materials arrive at your facility, you can add them to your inventory:

1. Click the **+ New Item** button at the top right of the Inventory page.
2. Complete the fields in the **Add Inventory Item** form:
    - **Name*** — A clear item name (e.g., S355 Plate 10mm or Rebar 12mm).
    - **Heat Code** — Enter the heat/batch number if available.
    - **Material*** — Select the material grade (e.g., A36, S355, Aluminium 6061).
    - **Type** — Choose the product type (e.g., Plate, Bar, Rebar, Coil).
    - **Supplier** — Select an existing supplier from the list.
    - **Stock Location** — Choose where the item will be stored.
    - **Unit Price** — Optional price per piece or per unit weight.
    - **Quantity*** — Number of pieces.
    - **Dimensions (mm)** — Fill in whichever are relevant:
        - **Length (mm)**
        - **Width (mm)**
        - **Depth (mm)**
        - **Diameter (mm)**
    - **Weight (kg)** — Enter if known; otherwise leave as zero.
3. Click **Add Item** to save the new inventory record.

Example: Adding Steel Plates

Suppose you receive a delivery of 50 steel plates:

- **Name**: S355 Steel Plate 10mm

- **Heat Code**: AB12345678
- **Material**: S355
- **Type**: Plate
- **Supplier**: ABC Steel Supplies
- **Stock Location**: Bay 3, Rack A
- **Unit Price**: (optional)
- **Quantity**: 50
- **Length (mm)**: 2400
- **Width (mm)**: 1200
- **Depth (mm)**: 10
- **Weight (kg)**: Enter total or per-piece if known

Enter these details and click **Add Item**. The inventory updates immediately and becomes visible to all users.

Reordering / Duplicating Stock

If you regularly order the same items, you can quickly duplicate an existing stock item: 1. Find the item in your inventory list. 2. Click the **Actions** > **Duplicate** button (two overlapping squares icon) on that row.

Bulk Upload for Multiple Items

When you have many items to add (for example, after a large delivery or during initial setup):

1. Click the **Bulk Upload** button
2. Download the CSV template
3. Fill in your spreadsheet with inventory details:
4. One row per inventory item
5. Include all required columns (material type, dimensions, quantity, etc.)
6. Upload your completed file
7. Review the preview to verify data looks correct
8. Click **Confirm** to add all items

Always double-check your bulk upload data before confirming. It's easier to correct errors in the spreadsheet than to edit individual items afterward.

Updating Existing Stock

To update stock when materials are used in production or adjustments are needed. We offer a couple of ways to do this based on how you want to work.

Method 1: Direct Edit

1. Find the item in your inventory list (use search or filters)
2. Click the **Actions** > **Edit** button (pencil icon) on that row
3. Update the relevant information:
4. **Quantity** - Reduce after usage, increase if more arrives
5. **Location** - If material has been moved
6. **Status** - Mark as allocated, in-use, or available
7. Click **Save**

Method 2: Drawdown Usage

1. Find the item in your inventory list
2. Click the **Actions** > **Drawdown Usage** button (downward arrow icon) on that row
3. Enter the quantity or weight used in production
4. Click **Save**

Method 3: Split Stock

If you cut long products into smaller pieces and want to track the offcuts: 1. Find the item in your inventory list 2. Click the **Actions** > **Split Stock** button (scissors icon) on that row 3. Enter the quantity or weight of material being cut 4. Specify the dimensions of the new offcut pieces 5. Click **Save**

Update inventory immediately after cutting or using material (perhaps via a tablet on the shop floor) to keep data current. Real-time updates ensure everyone has accurate information.

Linking Mill Certificates to Inventory

One of GoSmarter's unique features for metals manufacturing is the ability to link mill test certificates directly to inventory items, ensuring full traceability and compliance.

Why Link Certificates?

Linking certificates to inventory provides:

- **Instant verification** of material properties (chemistry, grade, strength)
- **Product lineage** - Full traceability from mill to finished product
- **Compliance assurance** - Easy to prove materials meet specifications
- **Quick access** - View certificate data without searching through files

How to Link a Certificate

After digitising a mill certificate using GoSmarter's MillCert Reader AI (see the Digitising Mill Certificates Guide):

1. Open the inventory item you want to link
2. Click **Edit**
3. In the **Heat code** field simply enter the value associated with the items. NOTE: You may need to breakdown bulk deliveries into the relevant bundles or pieces first to ensure each inventory item has the correct heat code. this is easy to do with the Split option.
4. GoSmarter will automatically suggest matching certificates based on heat number

Viewing Certificate Data

Once linked, you can:

- Click on **Actions** > **View mill certificate** option
- See key properties (grade, chemical composition, mechanical properties) directly in the inventory view
- Download the original certificate PDF
- Verify compliance requirements instantly

Always link mill certificates to inventory items as soon as materials arrive. This ensures complete traceability and makes compliance audits much easier - you can pull records by date, supplier, or specification in seconds.

Managing Suppliers and Orders

Supplier Management

Keep track of who supplies your materials for better procurement and quality management.

Adding a Supplier

1. Go to **Company core data** > **Organisations** section in the navigation menu
2. Click **+ New Organisation**
3. Enter supplier details:
4. Company name
5. Contact person and details
6. Address
7. Select the Supplier role
8. Click **Save**

Linking Suppliers to Inventory

When adding inventory items, always select the correct supplier. This allows you to:

- See which materials came from which supplier
- Filter inventory by supplier
- Track supplier quality and reliability
- Quickly contact suppliers about specific batches

Order Management

GoSmarter helps you manage both customer orders and internal work orders that draw from inventory.

Creating a New Order

1. Navigate to **Orders** section
2. Click **+ New Order**
3. Enter order details:

4. Customer name or internal project
5. Required materials and quantities
6. Delivery date
7. Any special requirements

Example: Order for Cut Rebar

You receive an order for 100 pieces of cut rebar, 4m length, grade B500C:

1. Create new order with customer details
2. Specify: 100 pieces, 4m, B500C rebar in the order line items

Using Inventory Data Day-to-Day

Best Practices for Daily Operations

1. **Real-time updates** - Update usage immediately after cutting or consuming material
2. Use tablets or mobile devices on the shop floor for instant updates
3. This keeps data current for all team members
4. **Multi-user access** - Take advantage of cloud-based simultaneous access
5. Unlike single-user Excel files, multiple team members can view and update inventory at the same time
6. Production staff, managers, and office staff all see the same real-time data
7. **Regular reconciliation** - Perform periodic physical stock checks
8. Compare physical count with system data
9. Make adjustments as needed
10. Investigate significant discrepancies
11. **Use filters and search** - Find what you need quickly
12. Filter by material type, supplier, location, or availability
13. Search by heat number, batch number, or dimensions
14. Save frequently-used filter combinations

Performing Stock Audits

Regular audits ensure data accuracy:

1. **Physical count** - Count actual materials in your facility
2. **Compare with system** - Check against GoSmarter inventory levels
3. **Make adjustments** - For discrepancies:
4. Click **Edit** on the item
5. Enter the correct quantity based on physical count
6. Click **Save**

Tracking Offcuts and Remnants

After cutting products, you often have leftover pieces that can be reused:

1. When recording production usage, note any usable offcuts
2. Add the offcut as a new inventory item:
3. Material type: Same as original
4. Dimensions: Actual offcut size
5. Quantity: Number of offcut pieces
6. Status: Mark as "Offcut" or "Remnant"
7. Link to original heat's certificate for traceability
8. These offcuts become available inventory for future orders requiring shorter lengths

This practice reduces waste and improves material utilisation. See the Tracking and Reducing Scrap Guide for more on managing offcuts.

FAQ / Troubleshooting

Common Issues and Solutions

Q: What if I find a discrepancy between physical stock and GoSmarter?

A: Perform an inventory adjustment: 1. Click **Edit** on the item 3. Enter the correct quantity from your physical count 5. Save the adjustment

Q: How do I handle different units (kg vs tons, meters vs millimeters)?

A: - GoSmarter uses consistent base units (typically millimeters for length, kilograms for weight) - When entering data, use the unit shown in the field label - For conversions, use the built-in calculator or convert before entering - Contact your administrator if you need unit settings adjusted for your facility

Q: How do I handle materials from multiple locations or warehouses?

A: - Use the **Location** field when adding inventory - Create consistent location naming (e.g., "Warehouse A - Bay 3", "Yard 2 - Section C") - Filter inventory by location to see what's in each area - You can transfer materials between locations using inventory adjustments with location notes

Q: Can I import existing inventory data from Excel?

A: Yes, use the bulk upload feature: 1. Export your current Excel data 2. Download GoSmarter's CSV template 3. Map your Excel columns to the template columns 4. Upload the completed CSV 5. Review and confirm

For large or complex migrations, contact GoSmarter support for assistance.

Next Steps

Now that you understand GoSmarter's Inventory Management capabilities:

1. **Get started** - Add your current inventory using bulk upload or manual entry
2. **Link certificates** - Use the Mill Certificates Guide to digitize and link your MTCs
3. **Optimise cutting** - Use inventory data with the Production Planning Guide to reduce waste
4. **Track scrap** - Follow the Scrap Management Guide to record offcuts and minimise waste

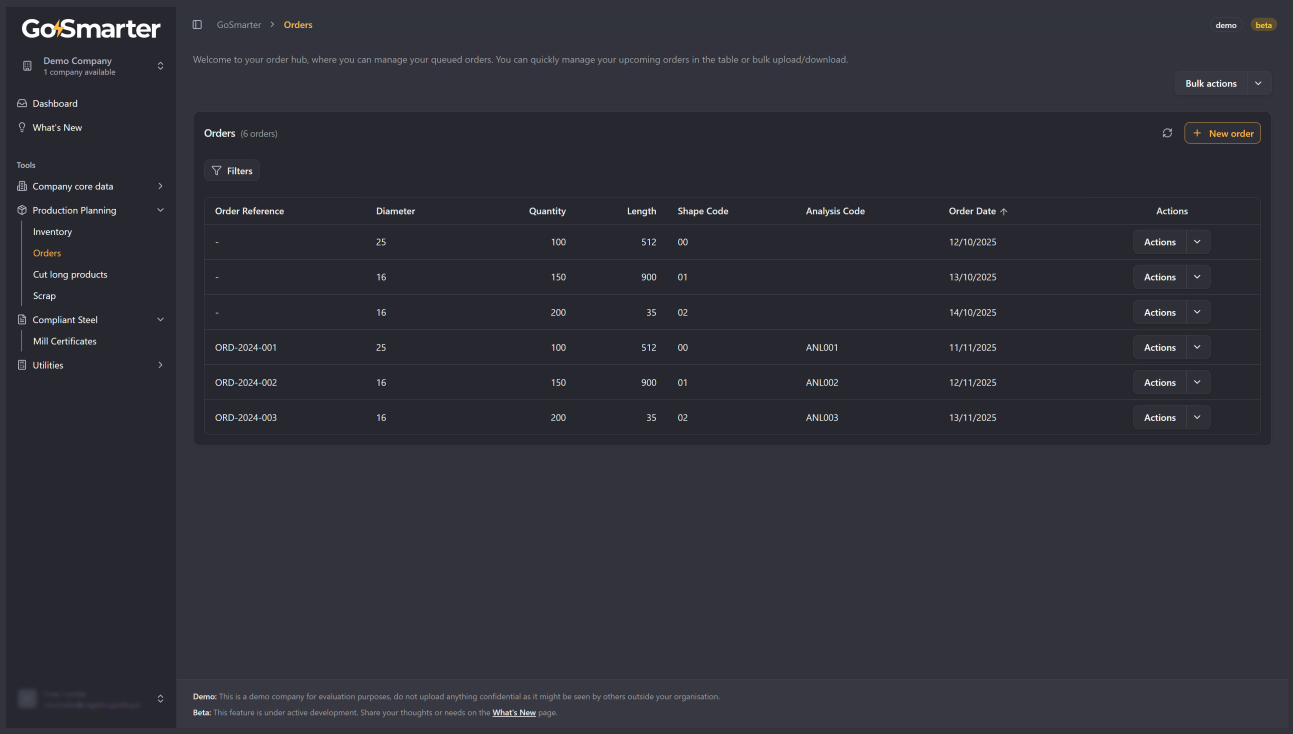
Additional Resources

- Dashboard Overview - Understand your main GoSmarter view
- Orders Management - Learn to manage customer orders
- Quick Reference - Common tasks at a glance
- Troubleshooting - Solutions to common issues

With GoSmarter as your inventory management system, you're free from juggling spreadsheets. You now have real-time visibility, better traceability, and a foundation for optimising your entire production process.

Orders Management

The Orders page is where you manage customer requests and orders.



Understanding Orders

What You'll See

The Orders page shows all your customer orders in a table. Each order can have many line items

Common columns you'll see:

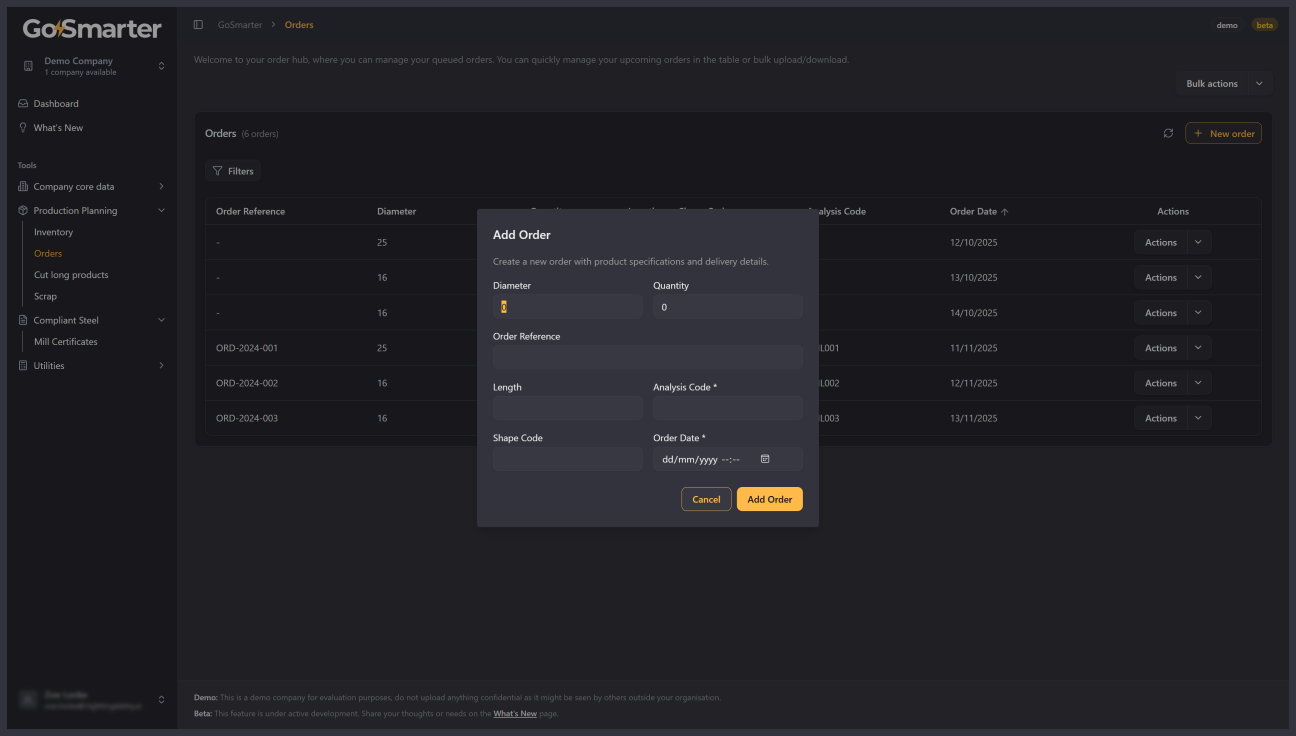
- **Order Number** - Unique reference for each order
- **Customer** - Who placed the order
- **Status** - Whether it's pending, in progress, or complete
- **Due Date** - When the customer needs it

Creating Orders

When a customer places a new order, you need to record it in the system.

Adding a Single Order

1. Click the **+ New Order** button at the top right
2. A form will appear
3. Enter order details:
4. Customer name or internal project
5. Required materials and quantities
6. Delivery date
7. Any special requirements
8. Click **Save** to create the order



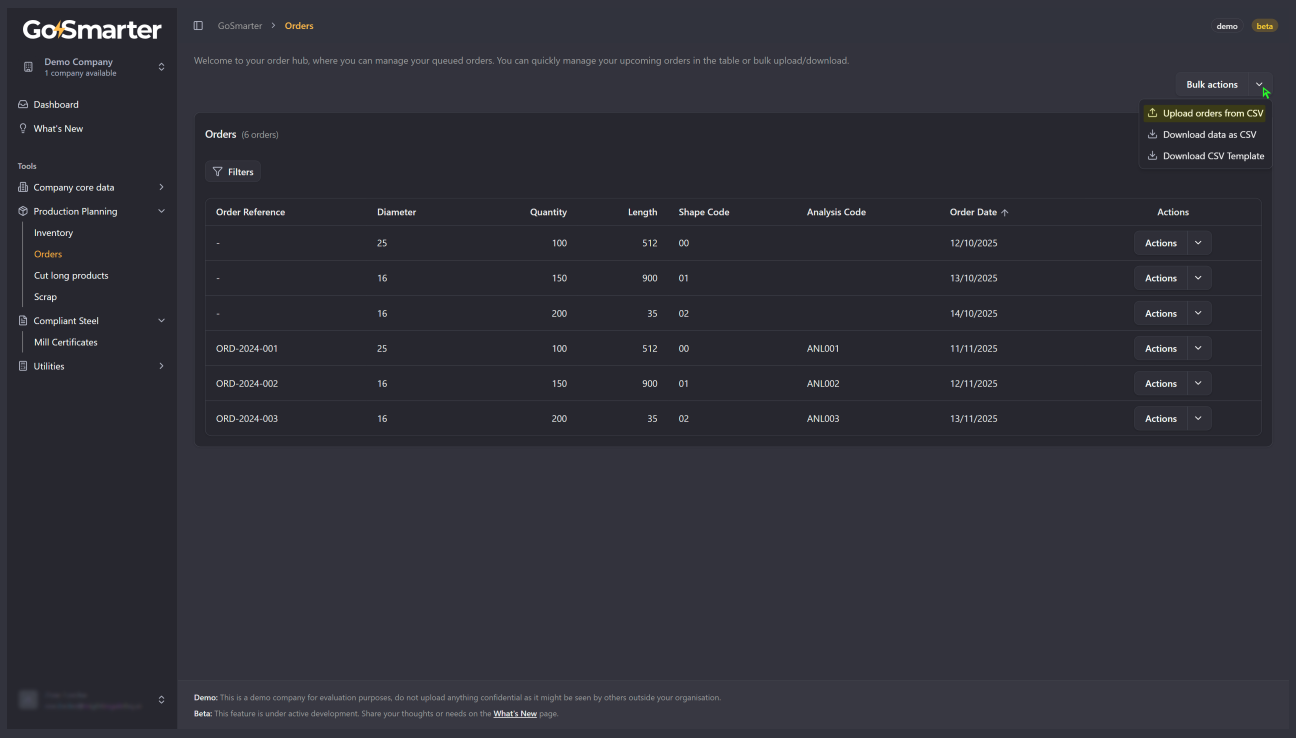
Make sure the order number is unique so you can track it easily.

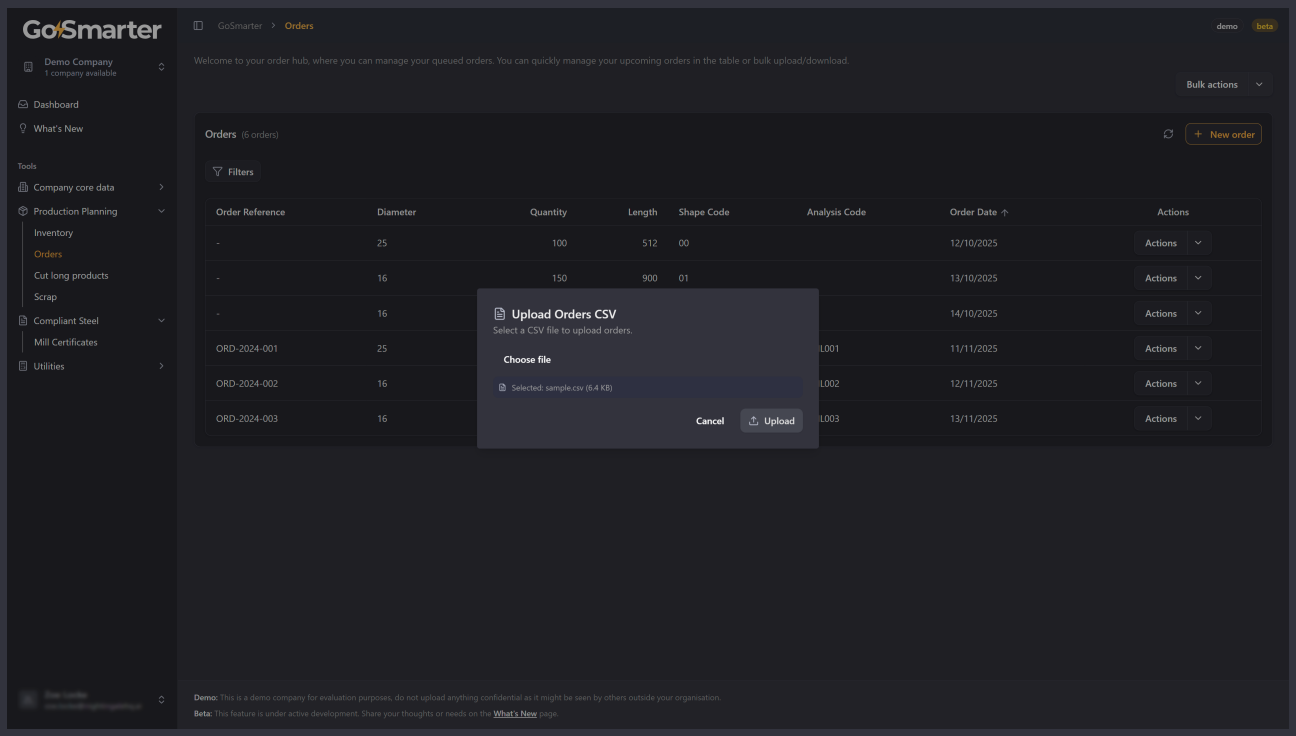
Uploading Multiple Orders

If you have many orders to enter at once:

1. Click the **Upload** button

2. Download the template if you need it
3. Fill in your spreadsheet with order details and order line item details - these are linked by your order reference number
4. Upload your completed file
5. Review the preview carefully
6. Click **Confirm** to create all orders





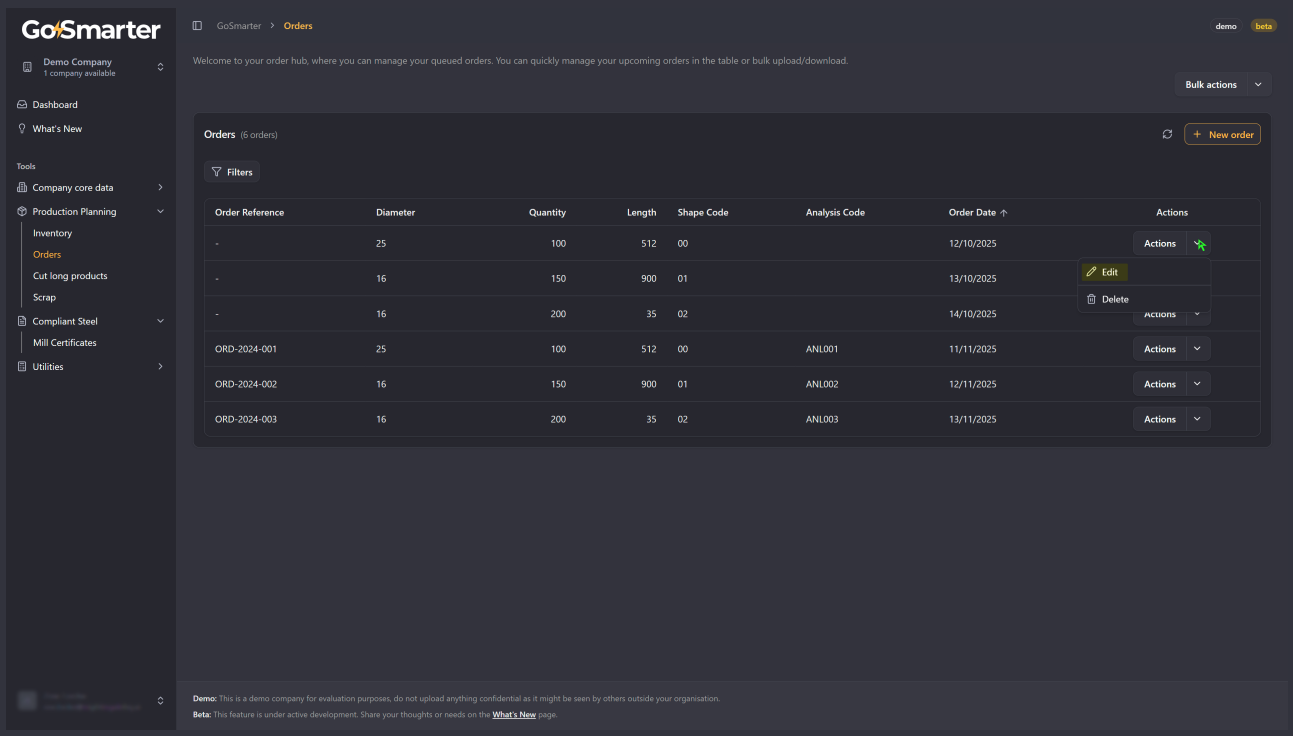
This is especially useful when receiving orders by email or from your sales system.

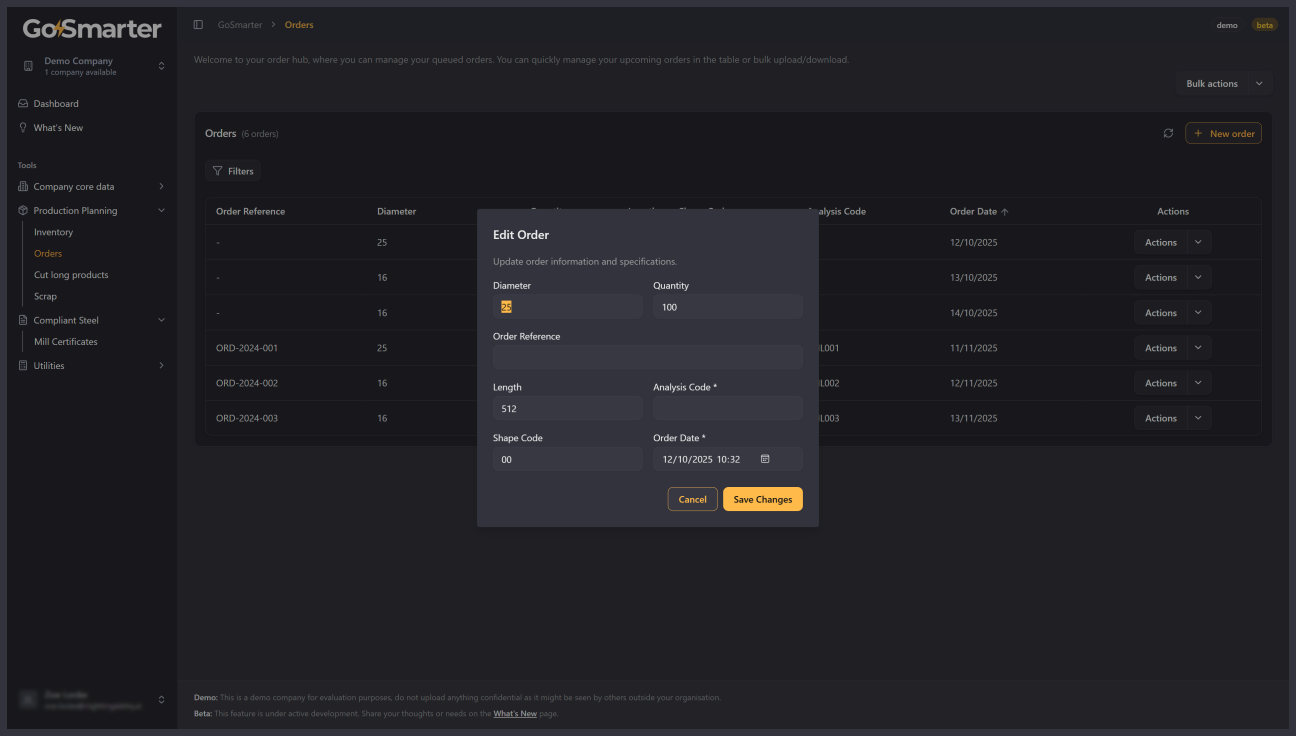
Updating Orders

Editing an Order

Things change - quantities, dates, specifications. Here's how to update:

1. Find the order in your list
2. Click the **Edit** button (pencil icon)
3. Update the information that's changed
4. Click **Save**





Common updates:

- Changing quantity based on customer revision
- Updating the due date
- Adding notes about special requirements
- Changing status as work progresses

Changing Order Status

Track progress by updating status:

1. Edit the order
2. Change the **Status** field:
3. **Pending** - Not started yet
4. **In Progress** - Currently working on it
5. **Complete** - Finished and delivered
6. Save your changes

Keep status up to date so you always know what needs attention.

Deleting an Order

If an order is cancelled:

1. Find the order in the list
2. Click the **Delete** button (trash icon)
3. Confirm the deletion
4. The order will be removed

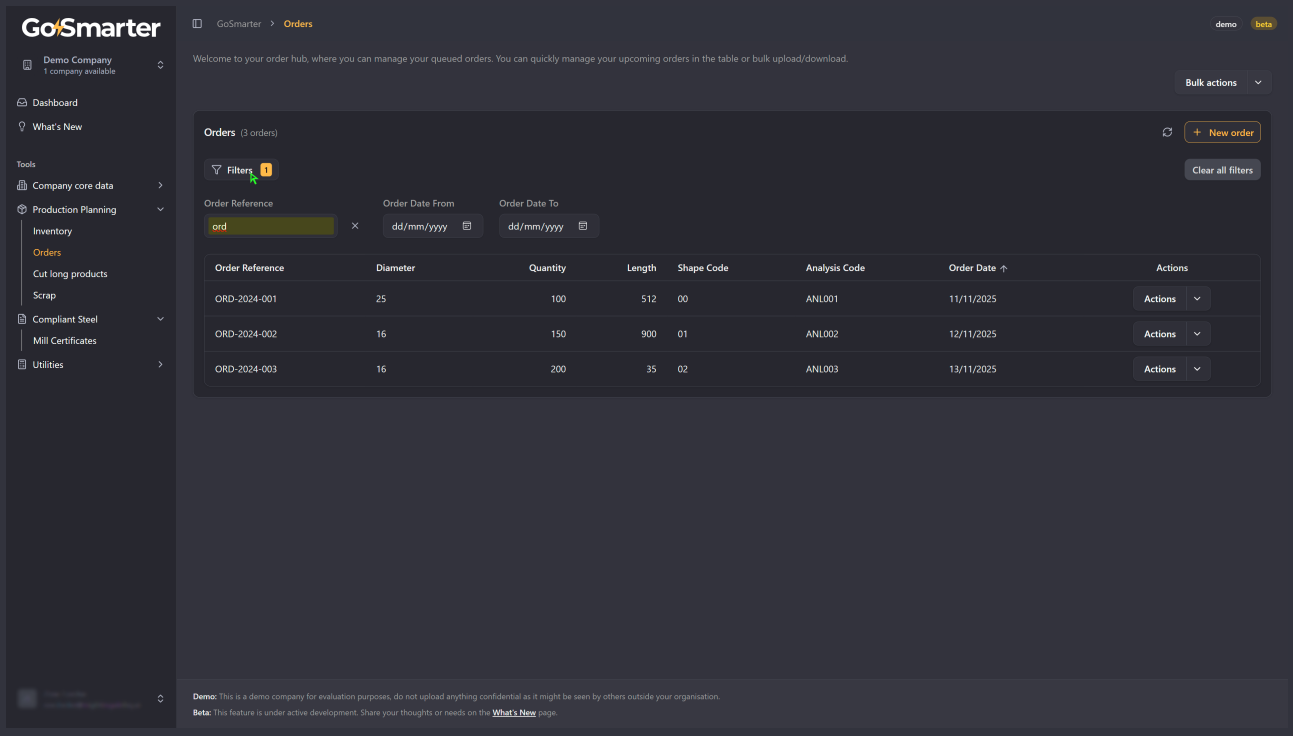
Only delete orders that are genuinely cancelled. For completed orders, mark them as "Complete" instead. You can always restore accidentally deleted orders, if needed.

Searching and Filtering Orders

Finding Specific Orders

Use the filter box to find orders quickly:

1. Click the **Filter** button
2. Set your criteria
3. Click **Apply**



Sorting Orders

Click column headers to organise your view:

- **Sort by Due Date** - See what's most urgent
- **Sort by Customer** - Group orders together
- **Sort by Status** - Group by workflow stage

Viewing Order Details

To see complete information about an order:

1. Click on any order row
2. A detail panel opens showing:
3. Full specifications
4. All notes and special requirements
5. Status history
6. Related cutting plans (if generated)

Common Questions

What if a customer changes their mind about the quantity?

Edit the order and update the quantity. The system keeps a record of changes.

Can I see old completed orders?

Yes, use the status filter to show complete orders. They remain in the system for your records.

How do I know if I can fulfill an order with current inventory?

Check the inventory section for matching material, diameter, and length. The Cut long products tool can help plan this.

What if an order needs multiple different items?

Enter each item as a separate order line. Use the same order number with a suffix like ORD-101-A, ORD-101-B.

Keep your orders updated and you'll always know exactly what needs to be produced!

Digitising Mill Certificates and Ensuring Compliance

This guide is designed for quality assurance managers, compliance officers, and anyone who handles Mill Test Certificates (MTCs) or material test reports (MTRs). Learn how to use GoSmarter's Compliant Metals feature with its MillCert Reader AI to turn piles of certificate PDFs into searchable, actionable data.

Overview

The Problem

Manufacturers often receive material certificates as scanned PDFs or emails. Finding the right certificate later or extracting specific details can take hours of manual searching through files or different mill portals. This creates bottlenecks in:

- Verifying material specifications before use
- Responding to customer requests for certificates
- Conducting compliance audits
- Ensuring traceability for safety-critical applications

How GoSmarter Solves This

GoSmarter digitises mill test certificates in seconds using AI technology:

- **Automated extraction** - Upload a PDF, get structured data instantly
- **Searchable database** - Find any certificate by heat number, batch, supplier, or specifications
- **Full traceability** - Link certificates to inventory for complete product lineage
- **Compliance ready** - Generate reports and documents for audits with one click

One manager saved 120 hours per year by automating certificate handling with GoSmarter. Instead of manually searching through binders or typing data from PDFs, certificates are digitised and searchable in seconds.

Why This Matters for Safety and ISO Compliance

In metals manufacturing, using the correct grade material is critical:

- **Welding applications** - Wrong grade can compromise structural integrity
- **ISO compliance** - Traceability requirements for quality management systems
- **Customer requirements** - Many customers require certificates with deliveries
- **Legal liability** - Documentation proves materials meet specifications

GoSmarter ensures you can verify any material's specifications instantly, reducing compliance risk and improving quality assurance.

Uploading Certificates

Single Certificate Upload

To digitise a new mill test certificate: 1. Navigate to **Compliant Metals → Mill Certificates** in the main menu 2. Click **+Upload Certificate** 3. Click **Choose File** and select your PDF 5. Click **Upload** 6. GoSmarter's AI begins processing immediately

For best results, use clear, high-resolution scans or original digital PDFs. The AI can handle most mill certificate formats, including handwritten or lower-quality scans, but clarity improves accuracy.

AI Extraction Process

How It Works

GoSmarter uses advanced AI trained on mill certificates from suppliers worldwide. When you upload a certificate:

1. **Document analysis** - AI identifies the certificate type and format
2. **Data extraction** - Key fields are automatically extracted:
3. Heat number / Batch number
4. Steel grade / specification
5. Chemical composition (C, Si, Mn, P, S, etc.)
6. Mechanical properties (yield strength, tensile strength, elongation)

7. Dimensions (diameter, length, thickness)
8. Manufacturer/mill information
9. **Validation** - AI checks that extracted values are logical and consistent
10. **Structured storage** - Data is saved in searchable database format

This process typically takes 5-15 seconds per certificate page.

Viewing Extraction Results

Once processing is complete, you'll see the extracted data. The interface displays:

- **Certificate metadata** - Supplier, date, certificate number
- **Material identification** - Heat number, grade, dimensions
- **Chemical composition table** - All elements with percentages
- **Mechanical properties** - Strength values, elongation, hardness
- **Test results** - Any additional test data
- **Original PDF** - Link to view the source document

GoSmarter's AI is trained on mill certificates from suppliers our customers use, we train it continuously as we onboard more customers. As part of onboarding, we'll ask you about your common suppliers to prioritise training data.

Getting certificates for use elsewhere

After uploading, data is available exported as a CSV or as zip files of PDFs. The reason for the PDFs is to enable you to access the certificate PDFs for integration in other systems or for producing traceability packs.

Downbloading by page will give you a PDF per page and it will be named with all the heat numbers found on that page. Downloading by heat code will give you a PDF per heat code, named with the heat number.

By making copies of the PDFs available with metadata filenames, you can easily integrate them into other systems or produce traceability packs for customers.

Viewing and Searching Certificate Data

Finding Certificates Quickly

The power of digitised certificates is instant searchability. To find a certificate:

1. Navigate to **Mill Certificates** main page
2. Use the **Filter** area to search based on a range factors, including for a specific head code.

Results appear instantly, showing matching certificates with key information.

Viewing from Inventory

You can also access certificate data directly from inventory items (see Managing Inventory Guide).

1. On an inventory item, select **Actions → View Certificate** if the heat number is available
2. View the full certificate data linked to that material
3. Download the original PDF if needed

This provides instant verification when allocating materials to orders or checking specifications before use.

This relies on heat codes being entered against inventory items and the mill certificates being uploaded. Linking is automatic and requires no extra work once both sides are in the system.

Ensuring Traceability

Best Practice Workflow

For complete traceability, follow this workflow:

1. **Material arrives** → Upload mill certificate immediately
2. **Certificate digitised** → Verify key data extracted correctly
3. **Add heatcodes to inventory** → Make sure inventory items have correct heat numbers when added during Goods In / REceivable
4. **Material used** → Certificate data follows material through production
5. **Delivery to customer** → Certificate included automatically

This ensures every piece of material has verified, traceable properties from mill to final delivery.

Compliance Checks in Production

Pre-Production Verification

Before starting a job, production managers can verify materials meet specifications:

1. **Review job requirements** - What grade/properties are needed?
2. **Check allocated inventory** - What materials are assigned to this job?
3. **View certificate data** - Click certificate icons in inventory
4. **Verify compliance** - Confirm grade, properties meet requirements

Example: Before cutting steel for a job requiring B500C rebar:

1. Job specs require: B500C, minimum yield strength 500 MPa
2. Allocated stock: Inventory item #1234
3. View certificate for item #1234:
4. Grade: B500C ✓
5. Yield strength: 545 MPa ✓
6. Certificate valid ✓
7. Proceed with confidence

This verification takes seconds with digitised certificates vs. potentially hours of searching with paper systems.

FAQ / Troubleshooting

Common Questions and Solutions

Q: What if the AI misreads a value?

A: The AI is highly accurate but not perfect. To correct: 1. Click **Edit** on the field with the incorrect value 2. View the original PDF side-by-side for reference 3. Enter the correct value manually 4. Click **Save**

All edits are logged. Over time, you can report persistent issues to GoSmarter support to improve the AI.

Q: What if a certificate is not in English or uses unusual formatting?

A: - GoSmarter handles many languages and formats automatically - For very unusual formats (rare regional mill formats), the AI may struggle - If extraction fails or is very inaccurate: - Contact GoSmarter support with a sample - Meanwhile, manually enter key fields while keeping the original PDF in the system - Support can update the AI to recognise similar formats in future

Q: How do I handle multi-page certificates?

A: - Upload the entire multi-page PDF as one file - The AI processes all pages and combines the data

Q: Can I edit a certificate after it's been uploaded?

A: Yes: - Click **Edit** on any certificate - Modify any extracted field - You cannot edit the original PDF (it's read-only), but you can upload a replacement if needed - All changes are tracked in the audit log

Q: How do I export certificate data for use in other systems?

A: - Select the certificates you need - Click **Export** - Choose format: CSV (for Excel/database) or a PDF option - Download the export file

Q: Are my certificates secure?

A: Yes: - All data is encrypted in transit and at rest - Access is controlled by user permissions (only authorised users can view) - Audit logs track who accessed what and when - Data is backed up regularly - GoSmarter complies with relevant data protection standards

See the Security section below for more details.

Security Note

Data Protection for Sensitive Documents

Mill test certificates often contain sensitive information:

- Chemical analysis (proprietary blends)
- Supplier relationships
- Pricing information (sometimes)
- Test results that could be commercially sensitive

GoSmarter protects your data:

Encryption: - All data transmitted over HTTPS/TLS - Database encryption at rest - Certificate PDFs stored in encrypted storage

Access Control: - Role-based permissions (define who can view/edit certificates) - Multi-factor authentication available - User activity audit logs

Compliance: - Designed to support ISO 9001 quality management requirements - GDPR-compliant data handling

Backup and Recovery: - Automated daily backups - Point-in-time recovery available - Disaster recovery procedures tested regularly

Best Practices Summary

Quick Reference for Success

Certificate Management: 1. ✅ Upload certificates immediately when materials arrive 2. ✅ Verify AI-extracted data for critical fields 4. ✅ Use consistent naming for certificate files 5. ✅ Configure compliance rules for automatic checking

Quality Assurance: 1. ✅ Always verify grade and key properties before using material 3. ✅ Generate certificate packages for customer deliveries 5. ✅ Keep original PDFs even though data is extracted (for legal/audit backup)

Team Workflow: 1. ✅ Define roles: who uploads, who verifies, who can edit 2. ✅ Train all relevant staff on search and verification 3. ✅ Establish SOP for certificate receipt and digitisation 4. ✅ Review extracted data quality quarterly with GoSmarter support 5. ✅ Continuously improve process based on team feedback

Next Steps

Now that you understand GoSmarter's mill certificate digitisation capabilities:

1. **Start uploading** - Begin with current/active certificates, then add historical as time allows
2. **Link to inventory** - Use the Inventory Guide to connect certificates with materials
3. **Configure compliance** - Set up rules for your specific requirements
4. **Train your team** - Ensure quality, production, and office staff know how to search and verify
5. **Go paperless** - Phase out paper certificate management, keeping only digital copies

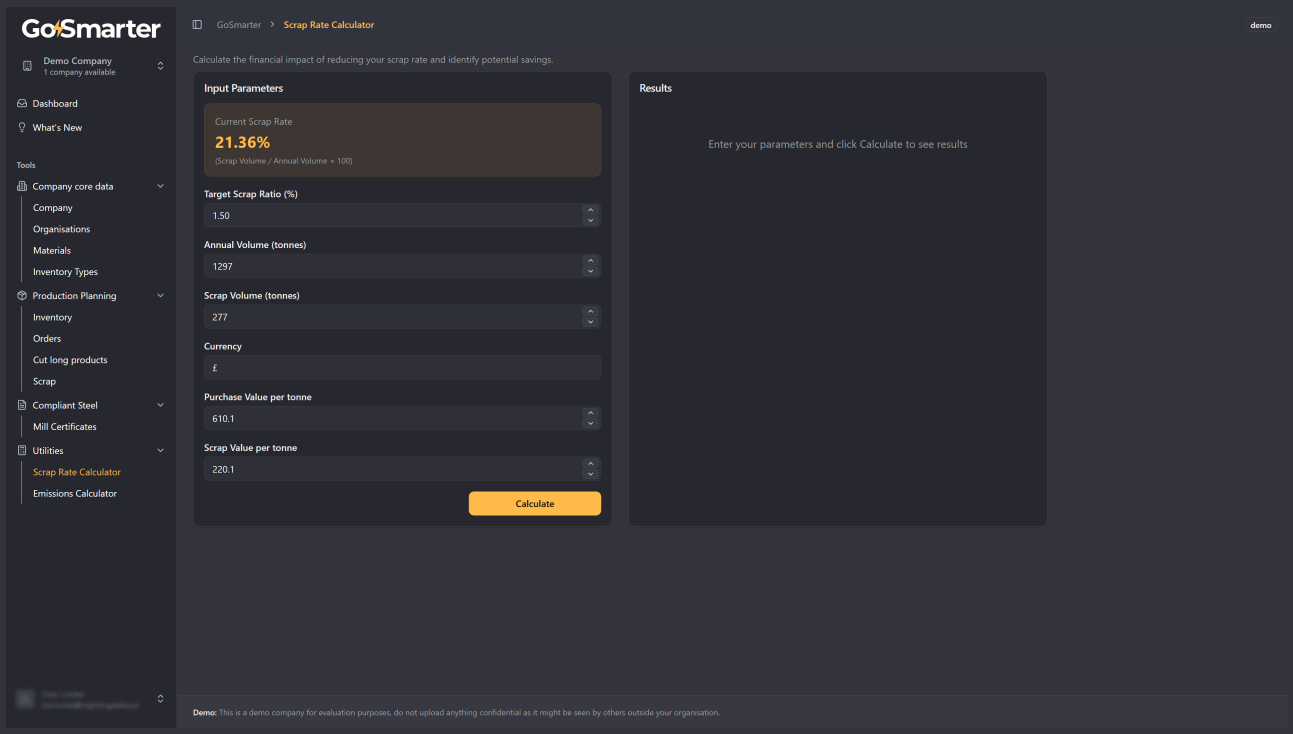
Additional Resources

- Managing Inventory and Daily Operations
- Customising GoSmarter - Advanced configuration options
- Troubleshooting - Solutions to common issues
- Getting Started - Basic GoSmarter navigation

You're now ready to move to a near-paperless system for mill test certificates. Upload, verify, search, and share certificates at the click of a button - saving tremendous time and ensuring compliance with minimal effort.

Scrap Calculator

The Scrap Calculator is a simple tool that helps you quickly figure out cutting patterns without creating a full order. It's useful for quick quotes or rough estimates.



What is Scrap Rate?

When you cut steel bars into smaller pieces, there's always some material left over that's too short to use. This is called "scrap" or "waste."

Scrap rate is the percentage of material that becomes waste.

Example:

- You have a 12,000mm (12m) bar
- You need to cut pieces that are 3,500mm long
- You can cut 3 pieces = 10,500mm used
- Leftover: 1,500mm (too short to use) = 12.5% waste

Why calculate scrap rate:

- Estimate material costs accurately
- Give customers better quotes
- Know how much extra material to order
- Compare efficiency of different cutting approaches

Using the Calculator

Basic Calculation

Open the Scrap Rate Calculator from the sidebar and you'll see a number of input fields:

Bar Length

- Enter the length of the bars you have (in millimeters)
- Example: 12000 for a 12-meter bar

Piece Length

- Enter the length of pieces you need to cut (in millimeters)
- Example: 3500 for a 3.5-meter piece

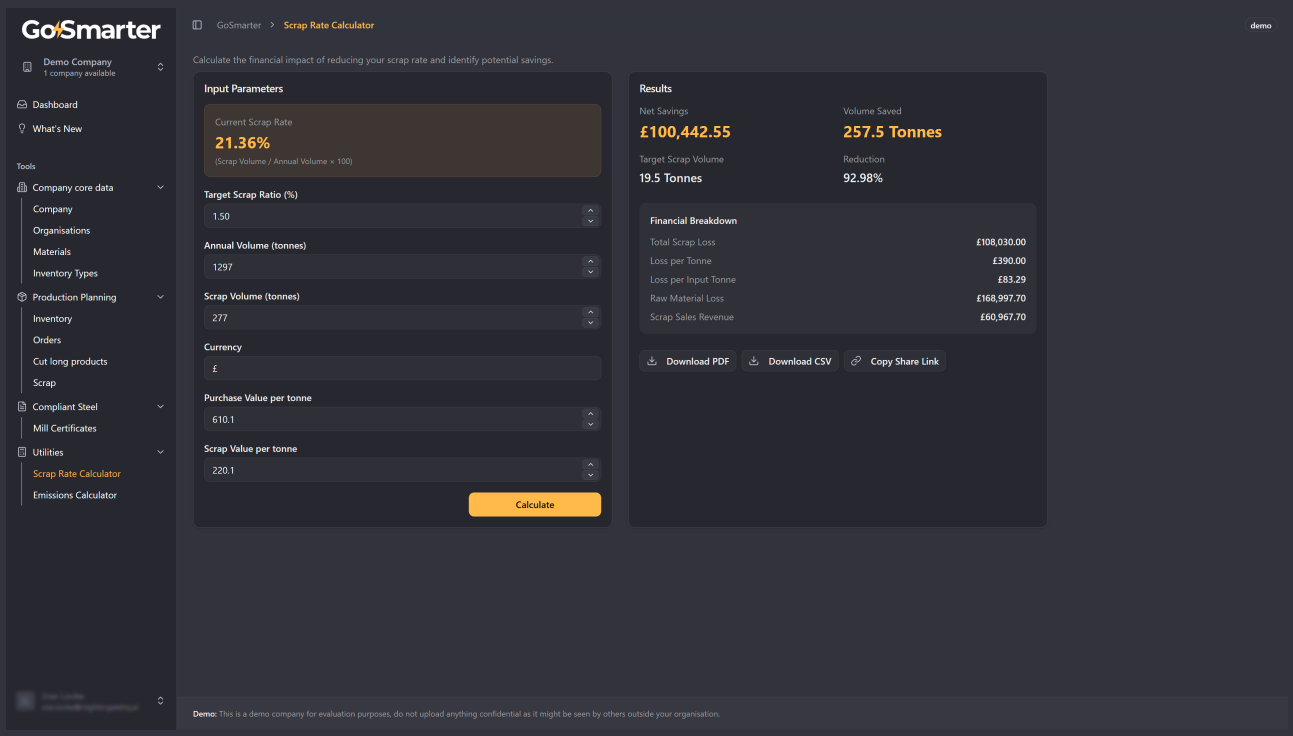
Allowance (optional)

- Enter extra length for saw blade width if needed
- Usually 5-10mm per cut
- Example: 5

Once you have filled in the form, Click **Calculate**

Understanding Results

What You'll See



The calculator shows:

Pieces per Bar

How many complete pieces you can cut from one bar

Total Used

- How many millimeters are used for cutting pieces

Waste per Bar

- How many millimeters are left over (too short to use)

Scrap Rate

- Percentage of material that becomes waste
- **Lower is better!**

Example Result

```
Bar Length: 12,000mm
Piece Length: 3,500mm
Allowance: 5mm per cut

Results:
Pieces per Bar: 3
Total Used: 10,515mm (3,500 + 5 + 3,500 + 5 + 3,500)
Waste per Bar: 1,485mm
Scrap Rate: 12.4%
```

Comparing Options

Use the calculator to compare different approaches:

Example: Finding the Best Bar Length

Option 1: Using 12-meter bars

- Piece needed: 3,500mm
- Pieces per bar: 3
- Waste: 1,500mm (12.5%)

Option 2: Using 6-meter bars

- Piece needed: 3,500mm
- Pieces per bar: 1
- Waste: 2,500mm (41.7%)

Option 3: Mix of lengths from 12-meter bars

- Pieces: 3,500mm and 4,000mm
- Waste: 1,000mm (8.3%)

Result: Option 3 is most efficient!

Try different combinations to find what minimizes waste.

Using Results for Quotes

When a customer requests a quote:

1. Enter their required piece length
2. Check the scrap rate
3. Add the waste percentage to your material cost
4. Include it in your price

Example pricing:

- Customer needs 100 pieces at 3,500mm
- Your bar costs $100 per bar
- Scrap rate: 12.5%
- True material cost: $100 + ($100 × 12.5%) = $112.50 per bar worth of material

Ordering Material

When ordering stock:

1. Calculate how many pieces you can get per bar
2. Calculate scrap rate
3. Order extra to account for waste

Example:

- Need: 100 pieces
- Pieces per bar: 3
- Bars needed: 34 bars (100 ÷ 3 = 33.3, round up)
- With 12.5% waste, order a couple extra bars for safety

Common Questions

Why does my actual waste differ from the calculator?

The calculator assumes perfect cuts. In practice, you may have additional factors like:

- Variations in bar length
- Saw blade width (kerf) - use the allowance field for this
- End trimming requirements
- Crooked bars requiring extra trimming

Should I include saw blade width?

Yes, use the allowance field. A typical saw might remove 5-10mm per cut.

What's a good scrap rate?

- **Under 2.5%** - Excellent efficiency
- **2.5-5%** - Good, typical for many operations
- **5-7.5%** - Acceptable but look for improvements
- **Over 7.5%** - High waste, try to find better combinations

Can the calculator help me plan actual cutting?

It's a quick estimation tool. For detailed cutting plans with your actual inventory and orders, use the Cut Long Products (Optimization) feature.

What if I need many different lengths?

For complex requirements with many different pieces, the Optimization tool is better - it handles mixed lengths and multiple bars automatically.

Tips for Reducing Scrap

1. **Mix lengths when possible** - Combine different piece lengths from one bar
2. **Choose bar lengths wisely** - Stock bars that divide well into common piece sizes
3. **Nest orders** - Group orders that work well together
4. **Use optimisation** - For complex cuts, let the optimiser find the best pattern
5. **Keep waste pieces** - Short drops might be useful for future small orders

---

Next Steps

After calculating scrap rates:

- Check inventory - See what bar lengths you have
- Review orders - Look for opportunities to combine lengths
- Run optimisation - Get detailed cutting plans for actual production

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Smart scrap rate planning means better quotes, lower costs, and happier customers!

GoSmarter.ai Implementation Project Plan

Purpose & Audience

This implementation project plan is a roadmap document aimed at project managers or champion users at customer organisations (e.g., digital transformation leads or IT/operations managers responsible for deploying GoSmarter company-wide). Its purpose is to guide the rollout of GoSmarter in a structured way, increasing the likelihood of success by addressing upfront planning, resource allocation, change management, and timeline.

In essence, this is a customer success playbook for launching GoSmarter across a metals manufacturing business. It covers what needs to happen in the first few weeks or months, from kickoff to full adoption. A well-defined plan is crucial in manufacturing environments to avoid disruptions – it helps coordinate tasks like data migration from legacy systems, integration with existing processes, and staff training.

This document defines success criteria (KPIs like reduction in manual entry, percentage of processes using GoSmarter, scrap reduction rates, etc.) so the company can measure ROI post-implementation.

Implementation Strategy

The implementation plan is structured in phases or steps, following best practices for SaaS deployment. We incorporate seven critical steps commonly recommended for SaaS rollout:

1. Assign an implementation owner
2. Define goals and scope
3. Plan rollout & training
4. Leverage vendor support
5. Migrate data
6. Integrate with other systems
7. Drive feature adoption

Each phase of the plan is presented clearly with its objectives, tasks, responsible parties, and timeframe. The tone is action-oriented and reassuring – providing practical tips to minimise risk

(e.g., test with a pilot group first, back up data) and highlighting GoSmarter's "zero-disruption" approach (no heavy downtime or long maintenance windows needed, given its cloud SaaS nature).

1. Project Kickoff & Vision Alignment

Objective

Establish the project's foundation. Ensure all stakeholders understand why the company is implementing GoSmarter and what success looks like.

Key Activities

1.1 Appoint the Implementation Owner/Project Lead

- Designate someone responsible for managing the rollout (often from IT or operations)
- Define roles of the core team:
- Sponsor from management
- Champions in each department
- IT/technical lead
- End-user representatives

1.2 Conduct a Kickoff Meeting

Schedule a kickoff meeting with GoSmarter's customer success manager (if available) and your internal team. In this meeting:

Review Current Pain Points:

- Excessive manual paperwork
- Data scattered in PDFs and spreadsheets
- Time-consuming certificate processing
- Inefficient production planning
- Lack of traceability and compliance visibility

Articulate the Vision and Goals:

- Automate certificate processing

- Centralize inventory data
- Reduce scrap by X%
- Save Y hours per week
- Improve compliance traceability
- Support carbon reduction goals

Define Scope:

- Which sites or departments will use GoSmarter first?
- Which GoSmarter modules are in scope for phase 1? (e.g., Inventory and Certificates first, then Production Planning)
- Clarify anything out of scope to avoid scope creep

1.3 Create Project Charter

Outcome of this step: A written Project Charter or summary listing:

- Team members and their roles
- Timeline overview
- Success metrics and KPIs
- Commitments and expectations
- Business outcomes (efficiency, carbon reduction, etc.)

Everyone should be aligned on expectations and enthusiastic about the benefits.

2. Define Success Metrics & Implementation Goals

Objective

Determine how you will measure the success of GoSmarter's implementation and set clear targets.

Key Activities

2.1 Identify Key Performance Indicators (KPIs)

Operational Efficiency Metrics:

- **Time to generate production plan:** Target reduced from 2 hours to 10 minutes
- **Certificate processing throughput:** Target to double the number of certificates processed per week
- **Hours saved on paperwork:** Track weekly time savings
- **Scrap rate reduction:** Target to cut scrap in half after 3 months (GoSmarter's planning can reduce scrap by 50%)

Adoption Metrics:

- **Order coverage:** "By end of Month 1, 80% of our active orders are planned through GoSmarter"
- **User engagement:** "By Month 2, all five plant supervisors are using GoSmarter daily for inventory checks"
- **Data quality:** "100% of mill certificates digitized and searchable within 6 weeks"

Business Impact Metrics:

- **ROI calculation:** Cost savings vs. subscription cost
- **Compliance improvements:** Reduction in audit preparation time
- **Carbon footprint:** Track emissions reduction through optimised cutting plans

2.2 Set Utilisation Goals

Define milestones at 1 month, 3 months, and 6 months where these metrics should be evaluated:

- **Month 1:** Pilot group fully onboarded, core features in daily use
- **Month 3:** Company-wide rollout complete, 80%+ adoption rate
- **Month 6:** Advanced features adopted, measurable ROI achieved

2.3 Determine Scope Boundaries

Note if any processes will not move to GoSmarter immediately:

- Perhaps the company will continue using its ERP for final invoicing but use GoSmarter for production planning
- Clarify these interfaces to manage expectations

- Document integration points and manual handoff processes

2.4 Documentation

Document these goals in the implementation plan. This ensures everyone knows what "success" is – important for motivation and post-implementation review.

3. Rollout Strategy & Timeline

Objective

Plan how GoSmarter will be rolled out to the organisation, in what sequence, and who needs training when. A phased rollout minimises disruption.

Key Activities

3.1 Determine Deployment Phases

Recommended Phased Approach:

Phase 1: Pilot Implementation (Weeks 1-4)

- Implement Inventory & Mill Certificates in one production site
- Select a representative pilot group (5-10 users)
- Focus on core functionality
- Gather feedback and refine processes

Phase 2: Module Expansion (Weeks 5-8)

- Expand to Scrap Tracking and Production Planning in pilot site
- Add more users from the same site
- Test integration workflows
- Document best practices learned

Phase 3: Company-Wide Rollout (Weeks 9-12)

- Roll out to additional sites or departments
- Deploy to quality/compliance team
- Full feature set available

- Monitor adoption and support needs

3.2 Create Implementation Timeline

Sample Timeline:

Week	Phase	Activities	Responsible Party
1-2	Pilot Setup	Environment configuration, data preparation, pilot user selection	Implementation Owner, IT Team
3-4	Pilot Training	Training sessions, initial usage, feedback collection	Implementation Owner, Champions
5-6	Pilot Refinement	Address feedback, optimize workflows, document processes	Implementation Owner, Champions
7-8	Phase 2 Rollout	Expand features, train additional users, test integrations	Implementation Owner, Department Leads
9-10	Company-Wide Training	Training sessions for all sites, support resources deployed	Champions, HR/Training Team
11-12	Full Deployment	Monitor usage, provide support, celebrate wins	Implementation Owner, All Teams

(Note: Actual timing will depend on company size and readiness. The key is sequencing steps to handle one area at a time and avoid chaos.)

3.3 Plan the Training Program

Training Delivery Methods:

- **Live training sessions:** In-person or via video conference
- **Written documentation:** For self-paced learning
- **Guided on-screen tours:** Interactive walkthroughs in the app
- **Quick reference guides:** Printable cheat sheets for each role

Training Schedule Example:

- **Week 2:** 2-hour training workshop for pilot users on GoSmarter's core features
- **Week 4:** 1-hour refresher session and Q&A
- **Week 9:** Department-specific training sessions (operations, production, quality)

- **Week 10:** Advanced features training for power users

Training Content:

- Process-specific guides tailored to user roles
- Onboarding guide for new users
- Video demonstrations of common workflows
- FAQ document addressing anticipated questions

Training Leaders:

- Internal champion with support from GoSmarter's team
- Department supervisors for role-specific training
- IT team for technical/integration topics

3.4 Stagger the Rollout

Introduce GoSmarter to different groups sequentially:

- **Week 3:** Operations team (handles inventory and ordering)
- **Week 5:** Shop floor supervisors (production planning tool)
- **Week 7:** Quality/compliance team (certificate management)
- **Week 9:** Management/reporting users (analytics and dashboards)

This approach prevents overload and lets early adopters mentor others.

3.5 Plan Internal Communications

Communication Strategy:

- **Pre-launch announcement:** Email from leadership explaining the change and benefits
- **Weekly updates during rollout:** "This week we digitised 300 certs and saved 10 hours of manual work!"
- **Success stories:** Highlight early wins and positive user feedback
- **Support information:** Clear instructions on how to get help
- **Change management messaging:** Address "what's in it for me" to preempt resistance

Key Messages:

- Why we're making this change (current pain points)
- What benefits users will experience
- How the transition will be supported

- Timeline and what to expect when
- How to access training and support

Output

A detailed timeline with milestones for each phase, ensuring clear accountability and manageable pacing.

4. Leverage Vendor Support

Objective

Make the most of any assistance offered by Nightingale HQ (the provider of GoSmarter) to ensure a smooth implementation.

Key Activities

4.1 Identify Areas for Vendor Assistance

Common Vendor Support Areas:

- **Data migration:** Bulk conversion of mill cert PDFs through their AI
- **Training:** Expert-led webinars for your staff
- **Custom integrations:** API setup and configuration
- **Best practices consultation:** Implementation strategy review
- **Technical troubleshooting:** Resolution of complex issues

4.2 Schedule Sessions with GoSmarter Experts

Recommended Consultations:

- **Week 1:** Kickoff meeting and implementation planning review
- **Week 2:** Integration consultation (if needed)
- **Week 3:** Feature configuration review
- **Week 4:** Training webinar for pilot users
- **Week 8:** Mid-implementation check-in

- **Week 12:** Post-rollout review and optimization

4.3 Clarify Support Channels and SLAs

Document Support Details:

- **Contact methods:** Email, chat, phone
- **Support hours:** Business hours and time zones
- **Response time SLAs:** Expected turnaround for different severity levels
- **Escalation procedures:** How to escalate urgent issues
- **Customer success manager:** Dedicated contact if available
- **Documentation resources:** Knowledge base, user guides, API docs

Example Support Structure:

- **Email support:** support@gosmarter.ai
- **Chat support (Coming soon):** Available during UK business hours
- **Response guarantee:** 24 hours for standard issues, 4 hours for critical
- **Dedicated CSM:** Available for enterprise customers

4.4 Ensure Secure Data Sharing

Security Considerations:

- Review and sign NDA if handling sensitive data before the implementation
- Confirm data handling compliance (GDPR, industry standards) and security
- Document what data will be shared with vendor
- Ensure access is properly provisioned and revoked post-implementation

5. Data Migration & Preparation

Objective

Get all necessary data into GoSmarter safely and accurately, forming the foundation for using the platform.

Key Activities

5.1 Inventory Data Import

Preparation Steps:

1. **Gather master inventory list** from current system (ERP or spreadsheets)
2. **Clean the data:**
3. Remove duplicates
4. Ensure consistent material IDs
5. Verify descriptions are accurate
6. Standardise units of measure
7. Validate pricing information
8. **Follow GoSmarter's import process:**
9. Review import template format
10. Map your data fields to GoSmarter fields
11. Perform test import with sample data
12. Validate imported data matches expectations
13. Execute full import
14. Verify post-upload data integrity

5.2 Orders/Projects Data Import

Preparation Steps:

1. **Gather master order list** from current system (ERP or spreadsheets)
2. **Clean the data:**
3. Remove duplicates
4. Ensure consistent customer IDs
5. Standardise units of measure
6. Validate pricing information
7. **Follow GoSmarter's import process:**
8. Review import template format
9. Map your data fields to GoSmarter fields
10. Perform test import with sample data

11. Validate imported data matches expectations
12. Execute full import
13. Verify post-upload data integrity

5.3 Mill Certificates Archive

Ensure GoSmarter supports your certificate formats. GoSmarter builds custom parsers for each supplier to ensure you get the most accurate data extraction. Check our list of supported suppliers and give us samples from any suppliers not listed.

Certificate Migration Strategy:

Decision Point: Determine scope of historical certificate upload

- **Option A:** Upload all historical certificates (comprehensive but time-intensive)
- **Option B:** Upload representative batch for training (faster, focused on recent data)
- **Option C:** Only process new certificates going forward (minimal migration)

Recommended Approach:

- Upload last 6-12 months of certificates to populate system
- This provides useful historical data for traceability
- Allows staff training with real-world examples
- Balances comprehensiveness with time investment

Process:

1. Collect certificates from email archives, network drives, or filing cabinets
2. Organise by date, material type, or supplier
3. Use GoSmarter's AI-powered certificate processing
4. Verify extracted data accuracy through spot-checks
5. Address any extraction errors or ambiguous data

5.4 Scrap/Rework Data

Baseline Data Collection:

- Gather historical scrap rates (last quarter or year)
- Document current offcut management practices
- Calculate current material utilisation percentage
- Track rework instances and causes

Purpose: Establish baseline for measuring improvement after GoSmarter implementation

5.5 Data Mapping & Validation

For migrations from another system:

- **Field mapping exercise:** Ensure data maps correctly
- Material heat numbers → GoSmarter certificate fields
- Product codes → GoSmarter inventory IDs
- Supplier names → Standardised vendor list
- Units of measure → Consistent measurement system
- **Test and validate:**
- Small test import first
- Verify all critical fields populated correctly
- Check for data truncation or formatting issues
- Confirm relationships between data entities

5.6 Address Data Security & Backup

Security Measures:

- **Pre-migration backup:** Create complete backup of current system data
- **Cloud security verification:** Confirm GoSmarter's security infrastructure
- Data encryption (in transit and at rest)
- Access controls and authentication
- Compliance certifications that are required to process your data, based on your own regulatory environment
- **Access management:** Limit who can view/edit sensitive data during migration
- **Audit trail:** Document what was migrated, when, and by whom

Reassurance: GoSmarter runs on secure cloud infrastructure with enterprise-grade encryption and access controls, ensuring your manufacturing data is protected.

Output

GoSmarter environment populated with real data – inventory items, live orders, initial certificates – ready for users to work with. This sets the stage so users log into a system that reflects their business, making training more realistic and impactful.

6. Integration with Existing Systems (if needed)

Objective

Connect GoSmarter with other tools in the company's tech stack to ensure a seamless workflow (optional, depending on the company's needs).

Key Activities

6.1 Identify Integration Points

Common Integration Scenarios:

ERP/MRP Systems:

- Order flow: ERP → GoSmarter (production planning)
- Inventory sync: GoSmarter ↔ ERP (material tracking)
- Completion data: GoSmarter → ERP (production actuals)

Quality Management Systems:

- Certificate data export to QMS
- Compliance reporting integration
- Non-conformance tracking

Financial Systems:

- Material usage for cost accounting
- Scrap value calculations
- Job costing data

Other Systems:

- CAD/CAM systems (cutting plans)
- Warehouse management (inventory locations)
- Customer portals (order status)

6.2 Develop or Configure Integrations

Integration Methods:

API Integration:

- Review GoSmarter API documentation
- Develop or configure API calls
- Set up authentication and security
- Implement error handling and logging

File-Based Integration:

- CSV/Excel export/import
- Scheduled batch transfers
- File format mapping
- Automated file pickup/delivery

Manual Integration:

- Interim process for low-volume data
- Weekly or daily manual syncs
- Clear procedures documented

Example Implementation:

- Schedule IT team to script a daily export of new inventory receipts from ERP to GoSmarter
- Set up automated import of cutting plans from GoSmarter to CAD system
- Configure weekly export of scrap data to accounting system

6.3 Test Integrations

Testing Protocol:

1. **Unit testing:** Test each integration point individually
2. **Integration testing:** Test end-to-end workflows
3. **Data validation:** Verify data accuracy and completeness
4. **Error handling:** Test failure scenarios and recovery
5. **Performance testing:** Ensure adequate speed and reliability

Example Test Scenario:

- Create a new order in the ERP
- Verify it appears in GoSmarter (or can be imported without issue)
- Generate a cutting plan in GoSmarter
- Confirm the plan can be fed back to production systems if needed

- Validate all data fields are correctly transferred

Allow time for:

- Troubleshooting data mismatches
- Resolving technical glitches
- Refining mapping rules
- User acceptance testing

6.4 Phased Integration Approach

Integration Prioritisation:

Phase 1 (Initial Rollout):

- Minimal or no integrations
- Manual data exchange if needed
- Focus on standalone GoSmarter adoption
- Prove value before adding complexity

Phase 2 (Post-Adoption):

- Implement highest-value integrations
- Start with read-only integrations (safer)
- Add write-back capabilities once proven
- Expand to nice-to-have integrations

Benefits of Phased Approach:

- Show quick results without integration delays
- Learn system before adding integration complexity
- Reduce risk of implementation failure
- Allow time to secure integration resources

Key Principle: Since GoSmarter is meant to be zero-disruption and can run standalone, only integrate if it truly adds value. Keep the initial implementation lean to demonstrate results quickly, then expand.

Output

If chosen, key systems are talking to each other, reducing double data entry. If integrations are not done in initial rollout, the plan documents how data will be managed manually in the interim.

7. Adoption, Monitoring, and Ongoing Optimisation

Objective

Ensure that after GoSmarter is rolled out, users actually use it as intended and the company realises the projected benefits. Also set up a feedback loop for continuous improvement.

Key Activities

7.1 User Adoption Tracking

Monitoring Methods:

- **Activity metrics:** Certificates processed, plans generated, inventory transactions
- **Feature utilisation:** Which features are used most/least

Identify Adoption Gaps:

- Departments or users with low adoption rates
- Reach out to understand barriers or issues
- Provide additional training or support
- Address any technical or workflow obstacles

7.2 Feature Phasing Strategy

Progressive Feature Introduction:

Weeks 1-4 (Core Features):

- Digital certificate management
- Basic inventory tracking
- Simple production planning
- User gets comfortable with fundamentals

Weeks 5-8 (Intermediate Features):

- Advanced search and filtering
- Scrap tracking and reporting
- Multi-site inventory management
- Custom reports

Weeks 9+ (Advanced Features):

- Cutting plan optimiser (if applicable)
- Process automation features
- Integration capabilities

Rationale: Gradual expansion prevents overwhelm and builds user confidence. Master basics before introducing advanced functionality.

7.3 Gather Feedback

Feedback Collection Methods:

Formal Check-ins:

- End of Month 1: Structured feedback session
- End of Month 3: Mid-implementation review
- End of Month 6: Comprehensive evaluation

Continuous Feedback:

- In-app feedback mechanism
- Regular champion meetings
- Help desk ticket analysis
- User surveys (quarterly)

Key Questions to Ask:

- What features do you use most? Why?
- What features are you not using? Why?
- What difficulties have you encountered?
- What additional training would help?
- What would make the system more useful?
- What processes have improved? How much?

Feedback Response:

- Document all feedback systematically
- Prioritise issues by impact and frequency
- Create action plans for significant concerns
- Communicate back to users what's being addressed
- Request GoSmarter product improvements if needed

Example Action: "Someone finds the interface for scrap logging confusing – note this, provide additional guidance, ask GoSmarter for improvements. Continuous feedback helps tailor the tool to shop floor reality and increases user buy-in (they feel heard)."

7.4 Celebrate Quick Wins

Recognition Strategy:

Communicate Milestones:

- "In the first month, we processed 100% of mill certs through GoSmarter, saving an estimated 20 hours of data entry. Great job!"
- "Production planning time reduced from 2 hours to 15 minutes!"
- "Zero compliance issues in recent audit thanks to complete certificate traceability"

Recognition Activities:

- Email announcements of achievements
- Team meetings highlighting success stories
- Recognition for champion users who helped others
- Share before/after metrics showing improvement

Build Success Stories:

- Document specific examples of impact
- Capture user testimonials
- Create case studies for internal use
- Use success stories to motivate broader adoption

Positive Reinforcement: This encourages ongoing use and builds internal momentum for the change initiative.

7.5 Support & Maintenance Plan

Ongoing Support Structure:

Internal Support:

- **Champions:** Designated power users in each department
- **Help desk:** Internal contact for first-line support
- **Documentation:** Keep user guides updated as processes evolve
- **Training:** Onboarding for new employees

Vendor Support:

- **Technical issues:** Direct to GoSmarter support
- **Feature requests:** Channel through customer success manager
- **Updates:** Monitor GoSmarter release notes for new features
- **Best practices:** Participate in user community or webinars

Maintenance Activities:

- **Data quality:** Regular audits of data accuracy
- **User management:** Add/remove users as staff changes
- **Configuration updates:** Adjust settings as business needs evolve
- **Performance monitoring:** Track system performance and responsiveness

Key Advantage: GoSmarter is cloud-based and updates automatically (no heavy maintenance needed from IT). Internal admins should stay aware of new features by:

- Subscribing to GoSmarter's change log or newsletter
- Checking the guides/documentation site for "What's New"
- Attending vendor webinars on new capabilities
- Participating in user groups or forums

7.6 Post-Implementation Review

Timing: 3-6 months after full rollout

Review Components:

1. Metrics Assessment:

- Compare actual results vs. targets set in Phase 2
- Document all quantitative improvements:
- Scrap reduction percentage
- Time savings (hours per week)
- Production planning speed improvement
- Certificate processing throughput increase
- Compliance documentation time reduction

2. ROI Analysis:

- Calculate total cost (subscription + implementation time)
- Calculate total benefits (time savings × hourly rate, material savings, efficiency gains)

- Determine payback period and ongoing ROI

3. User Satisfaction:

- Survey user satisfaction scores
- Assess ease of use ratings
- Evaluate training effectiveness
- Measure support satisfaction

4. Process Improvements:

- Document workflow changes
- Identify best practices developed
- Note process standardisation achieved
- Recognise efficiency gains

5. Lessons Learned:

- What went well?
- What could have been done better?
- What would we do differently next time?
- What unexpected benefits were realised?
- What challenges were encountered and how were they resolved?

6. Next Steps:

- **For targets met:** Plan to leverage success (expand features, add more users)
- **For targets not met:** Identify why and adjust processes:
- Additional training needed?
- Process refinement required?
- Integration gaps to address?
- Change management interventions needed?

Output: Comprehensive post-implementation report documenting the journey, results, and future recommendations.

Key Message: Implementation isn't a one-time event but an ongoing journey – much like continuous improvement in manufacturing. Regular review and adjustment ensure you maximise the value of your GoSmarter investment.

8. Appendix

8.21Risk Log

A proactive risk assessment and mitigation plan:

Risk	Impact	Likelihood	Mitigation Strategy
User Resistance: Operators revert to old spreadsheet habits	High	Medium	• Ensure ease of use with guides and cheat sheets • Get supervisor support for new process • Demonstrate time-saving benefits early • Recognise early adopters
Data Import Errors: Data corruption or loss during migration	High	Low	• Perform test imports first • Maintain backups of all data • Validate data post-import • Have rollback plan
Integration Failures: Systems don't communicate properly	Medium	Medium	• Thorough testing before go-live • Phased integration approach • Have manual backup procedures • Engage vendor support early
Insufficient Training: Users don't understand how to use features	High	Medium	• Comprehensive training program • Multiple training formats (live, video, written) • Champions available for support • Ongoing training for new features
Project Timeline Delays: Implementation takes longer than planned	Medium	Medium	• Build buffer into timeline • Clear milestone tracking • Weekly progress reviews • Escalation procedures for blockers
Scope Creep: Project expands beyond original plan	Medium	High	• Clear project charter with defined scope • Change request process • Regular scope reviews

Risk	Impact	Likelihood	Mitigation Strategy
			• Executive sponsor approval for changes
Technical Issues: System performance or availability problems	Medium	Low	• Test system before full rollout • Understand SLA with vendor • Have support escalation path • Monitor system performance
Key Person Dependency: Implementation relies too heavily on one person	Medium	Medium	• Document all processes and decisions • Cross-train team members • Distribute knowledge across champions • Have backup leads identified

8.2 Change Management Best Practices

Do's:

- ✓ Involve end-users early in the process
- ✓ Communicate benefits clearly and frequently
- ✓ Provide comprehensive training in multiple formats
- ✓ Celebrate early wins and successes
- ✓ Listen to feedback and act on it
- ✓ Support users through the transition with available help
- ✓ Start with pilot groups to prove value
- ✓ Have executive sponsorship and visible support
- ✓ Be patient – adoption takes time

Don'ts:

- ✗ Drop the new tool on users without explanation
- ✗ Ignore user concerns or resistance
- ✗ Provide inadequate training or support
- ✗ Rush the rollout without proper preparation

- ✗ Assume everyone will embrace change immediately
- ✗ Forget to communicate progress and wins
- ✗ Leave users to figure it out on their own
- ✗ Implement everything at once without phasing
- ✗ Declare victory at go-live – adoption is ongoing

Change Management Principles for Manufacturing:

1. **Respect existing processes:** Understand why things are done the current way before changing them
2. **Show don't tell:** Demonstrate concrete time/cost savings rather than just promising them
3. **Shop floor input:** Get input from people who actually do the work daily
4. **Make it easy:** The new way should be easier than the old way, not harder
5. **Support is critical:** Users need to know help is available when they need it
6. **Cultural sensitivity:** Acknowledge that change is hard, especially for long-tenured staff
7. **Management alignment:** Supervisors and managers must model and reinforce the new behaviors

8.3 Sample Communication Templates

Pre-Launch Announcement Email

Subject: Introducing GoSmarter – A New Tool to Make Our Work Easier

Dear Team,

I'm excited to announce that we will be implementing GoSmarter, a new cloud-based platform designed to streamline our manufacturing operations.

Why are we doing this? Currently, we spend too much time on manual paperwork, searching for certificates, and managing data across multiple spreadsheets. GoSmarter will help us:

- Automate certificate processing and management
- Centralise our inventory data
- Optimise production planning to reduce scrap
- Save time on administrative tasks
- Improve our compliance and traceability

What does this mean for you? Over the next [X] weeks, we'll be rolling out GoSmarter in phases. [Department/Team] will be our pilot group, starting [date]. You'll receive training and support to help you get comfortable with the new system.

Timeline:

- [Date]: Pilot group begins
- [Date]: Company-wide training starts
- [Date]: Full rollout complete

Training and Support: We're committed to making this transition smooth. You'll have access to:

- Live training sessions
- Video tutorials
- Quick reference guides
- Champion users in your department for help

Questions? Contact [Implementation Owner] at [email/phone]

We're confident that GoSmarter will make your work easier and help us operate more efficiently. Thank you for your support of this important initiative.

[Executive Sponsor Name] [Title]

Weekly Progress Update Template

Subject: GoSmarter Implementation Update – Week [X]

This Week's Highlights:

- [Number] mill certificates processed through GoSmarter
- [Number] cutting plans generated
- [X hours] of manual work saved
- [Number] new users trained

Key Accomplishments:

- [Specific achievement 1]
- [Specific achievement 2]
- [Specific achievement 3]

User Feedback: "[Positive quote from user]" – [Name, Role]

Next Week:

- [Planned activities for next week]
- [Training sessions scheduled]
- [Milestones to achieve]

Need Help? Contact your department champion or [support email]

Thank you for your continued support!

[Implementation Owner]

Success Story Template

Subject: Success Story: How [Department] Saved [X] Hours with GoSmarter

The Challenge: [Describe the problem they were facing]

The Solution: [Describe how they used GoSmarter to address it]

The Results:

- Time saved: [X hours per week]
- Process improvement: [Specific metric]
- User feedback: "[Quote]"

What We Learned: [Key takeaways or best practices]

Congratulations to [Team/Individual] for this great success!

Conclusion

By following this implementation plan, a metals manufacturer can systematically adopt GoSmarter, mitigate common challenges (like employee resistance or data integration issues), and track the impact on their business. The structured approach aligns with SaaS best practices and is tailored to the manufacturing context for minimal disruption and maximum uptake.

Key Success Factors:

1. Strong executive sponsorship and visible support
2. Clear goals and measurable success metrics
3. Comprehensive training and change management
4. Phased rollout with pilot validation
5. Continuous feedback and improvement

6. Celebration of wins to build momentum
7. Patience and persistence through adoption curve

Remember: Implementation is not just a technical project – it's a change management initiative. Success requires attention to people, processes, and technology in equal measure.

Ready to get started? Use this plan as your roadmap, adapt it to your specific context, and embark on your GoSmarter journey with confidence. The result will be a more efficient, data-driven, and competitive manufacturing operation.

For questions or support with your GoSmarter implementation, contact your Customer Success Manager or visit the GoSmarter support portal.

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Owner: GoSmarter Customer Success Team

Tracking and Reducing Scrap with GoSmarter

This guide is designed for production managers, shop supervisors, and continuous improvement teams focusing on minimising scrap and waste in the manufacturing process. Learn how to use GoSmarter's Scrap Calculator, Scrap Logger, and Offcut Manager to reduce costs, improve sustainability, and drive data-driven process improvements.

Overview

Why Scrap Reduction Matters

Every bit of scrap represents:

- **Lost money** - Wasted material cost plus labor spent processing it
- **Environmental impact** - Unnecessary production, energy use, and CO2 emissions
- **Inefficiency** - Opportunities for process improvement
- **Competitive disadvantage** - Higher costs vs. competitors with lower waste

Real Results: In a trial, Midland Steel reduced scrap rates by 50% using GoSmarter's planning optimisation tools. This directly improved profitability and sustainability.

How GoSmarter Helps

GoSmarter provides comprehensive scrap management tools:

- **Scrap Logger** - Record and categorise all waste
- **Scrap Calculator** - Assess the financial impact of improving scrap rates
- **Inventory Offcut Manager** - Reusable remnants are first-class citizens to prevent waste
- **Production Planning Integration** - Optimise cuts to minimise scrap automatically

This guide shows you how to log scrap, analyse it, and use that data to take action that reduces waste.

Reducing scrap directly improves your bottom line and environmental footprint. GoSmarter makes scrap reduction a measurable, data-driven process rather than guesswork.

Logging Scrap and Offcuts

Recording Scrap After Production

At the end of each production run or cutting session, log the scrap produced:

1. Navigate to **Production → Scrap**
2. Click **+ Add entry**
3. Fill in the scrap entry form:
4. **Date/Time** - When scrap was produced/measured
5. **bin/Skip reference** - Where the scrap is
6. **Opening weight** - The bin weight before the latest batch of scrap
7. **Closing weight** - The bin weight including the latest batch of scrap
8. Click **Save**

Update scrap data immediately after each job (via tablet on shop floor if possible). This keeps data current and ensures nothing is forgotten. Regular logging builds a comprehensive dataset for analysis.

Managing offcuts in inventory

Not all remnants are waste - many can be reused. Tracking offcuts in inventory helps you track reusable pieces:

1. After a cutting operation, identify usable offcuts (pieces long/large enough for future use)
2. Navigate to **Production planning → Inventory**
3. Identify the relevant inventory item the offcut is from
4. If the offcut is the remainder of the inventory, edit the item and chane the type to "Offcut" and update the new dimensions
5. If only part of the inventory item was used to make an offcut, Split the original item and say what quantity or weight was originally picked to make the cut. This discounts the original inventory item and creates a new offcut item with the remaining quantity or weight. You can then edit the properties to reflect the new dimensions of the offcut.

The offcut is now available in your inventory for future orders requiring shorter lengths.

Example: Managing Rebar Offcuts

You cut 10 x 12m rebar bars into 10m pieces for an order: - Ordered: 10 pieces @ 10m - Source: 10 bars @ 12m - Result: 10 offcuts @ 2m each

Instead of scrapping the 2m pieces: 1. Add to Offcut Manager: 10 pieces, 2m long, grade B500C, 12mm diameter 2. Link to original heat's certificate 3. Store in designated offcut area 4. Later, when an order needs 1.5m pieces, these offcuts can be used

Result: What would have been 20m of scrap becomes useful inventory, reducing both waste and future material costs.

Systematically tracking and reusing offcuts can reduce scrap by 10-20% in typical operations. GoSmarter ensures these remnants don't get lost or forgotten.

Best Practices to Reduce Waste

1. Use Production Planning Optimisation

GoSmarter's Production Planning tool (see Optimised Production Plans Guide) drafts optimised cutting patterns by:

- Analysing orders and available stock
- Generating plans that minimise scrap
- **Proven results:** 50% scrap reduction in trials

Action: Always run the Production Planner for long product cutting jobs rather than planning manually to save time and reduce waste.

2. Maintain Accurate Offcut Inventory

Reusable offcuts can't help if you don't know you have them:

- Log all offcuts immediately after cutting
- Store offcuts in organised, labelled areas
- Include offcut inventory in planning (Planner can suggest using offcuts)
- Regularly review and use older offcuts before they get damaged or lost

3. Optimise Stock Length Procurement

Use scrap data to inform purchasing decisions:

- Review which stock lengths generate most scrap
- Consider ordering different standard lengths that better match your typical orders
- Example: If you frequently cut 3.5m pieces, stocking 10.5m bars (3 x 3.5m) instead of 12m bars eliminates scrap

Action: Run a quarterly analysis of most common order lengths vs. most common stock lengths. Adjust stock inventory to minimise mismatch.

4. Regular Logging Drives Improvement

The act of measuring scrap makes people more conscious of it:

- Make scrap logging part of the job completion process
- Review scrap data in production meetings
- Set scrap reduction goals and track progress
- Celebrate improvements

Example KPI: "Reduce scrap rate from 15% to 10% over next quarter"

5. Investigate Scrap Spikes Immediately

When scrap suddenly increases:

- Use GoSmarter reports to identify when/where it happened
- Investigate the cause (machine issue, material quality, operator change, etc.)
- Fix the root cause quickly before it becomes normal
- Document learnings for future reference

6. Balance Speed vs. Waste

Sometimes rushing causes waste:

- Rushed jobs may skip optimisation to save planning time
- Result: Higher scrap from suboptimal cutting patterns
- **Better approach:** Invest 10 minutes in planning to save material worth hundreds of dollars

Foster a culture where minimising scrap is valued, not just speed. When operators know their scrap rates are tracked and matter, they'll take time to do it right.

Sustainability Angle: Scrap and Carbon Footprint

Environmental Impact of Scrap

Scrap represents wasted resources and environmental impact:

- **Energy** - Energy used to produce steel that becomes waste
- **CO2 Emissions** - Carbon footprint of that wasted production
- **Raw materials** - Iron ore, coal, etc. that went into wasted steel
- **Transportation** - Emissions from shipping material that becomes scrap

Reducing scrap directly reduces your environmental footprint.

Using the Emissions Calculator

GoSmarter includes an Emissions Calculator (see Customising GoSmarter Guide for details):

1. Navigate to **Tools → Emissions Calculator**
2. Enter parameters:
3. Material type (different steel grades have different carbon footprints)
4. Weight or tonnage
5. Click **Calculate**
6. View estimated CO2 emissions

Example: If you scrap 2 tons of steel per month: - Input: 2 tons, Steel Grade 500 - Calculator shows: ~4 tons CO2 equivalent - Annual scrap: 24 tons steel = ~48 tons CO2

If you reduce scrap by 50% (to 1 ton/month): - Save 12 tons steel/year - Reduce CO2 by ~24 tons/year

This data can support: - Sustainability reporting - Carbon reduction initiatives - ESG (Environmental, Social, Governance) commitments - Marketing claims about environmental responsibility

Scrap reduction saves money AND reduces environmental impact. Use GoSmarter's data to quantify both benefits, supporting business case for continuous improvement investments.

FAQ / Troubleshooting

Common Questions

Q: How do I edit a scrap entry if I made a mistake?

A: 1. Go to the **Scrap** page 2. Find the entry you need to change 3. Click **Edit** 4. Make corrections 5. Click **Save**

All edits are logged in the audit trail.

Q: What if scrap was reused immediately (not stored as offcut)?

A: - If material was used in the same job, don't log it as scrap - If it will be used very soon, you can either: - Not log it (if it's immediate reuse) - Log it as an offcut with a note "reused on Job #XYZ"

The goal is accurate tracking, so use whichever approach makes sense for your workflow.

Q: Does GoSmarter track scrap sales?

A: - GoSmarter primarily tracks scrap generation and reduction - For full scrap sales/revenue tracking, you may need to integrate with your finance system or ERP - Contact support if scrap revenue tracking is a requirement

Q: Can I set scrap targets or goals?

A: Not at present, but you can monitor scrap trends over time in reports. Use this data to set manual targets for your team.

Q: How do I categorise different types of scrap?

A: - You can customise the Inventory Types to track different types of scrap in inventory - Common categories: Offcuts (reusable remnants), Trim waste, Defective material, Setup waste, etc. - Alternatively, you can have different scrap bins/skips for different types of scrap and log accordingly in the Scrap tracker

Q: What if we have multiple production lines or locations?

A: - Tag scrap entries with Line/Machine/Location - Reports can filter by these tags - This shows which areas have highest scrap rates - Helps focus improvement efforts where they'll have most impact

Integration with Production Planning

The Scrap Reduction Cycle

1. **Plan optimally** - Use Production Planner to minimise expected scrap
2. **Execute** - Follow the optimised cutting plan
3. **Log actual scrap** - Record what actually happened
4. **Compare** - Did actual match planned? If not, why?
5. **Analyse** - Use reports to find patterns and opportunities
6. **Improve** - Make changes based on insights
7. **Repeat** - Continuous improvement cycle

Using Both Tools Together

Production Planning Guide (see Optimised Production Plans) shows how to: - Generate optimal cutting plans that minimise waste - The Planner suggests which stock to use and how to cut it

This Scrap Guide shows how to: - Track actual scrap vs. planned scrap - Analyse trends and identify issues - Manage offcuts for reuse

Together: Plan optimally, execute, measure, improve. This creates a data-driven scrap reduction program.

Next Steps

To implement effective scrap management with GoSmarter:

1. **Start logging** - Begin recording scrap for all production runs
2. **Use the Planner** - Implement optimised production planning (see Production Planning Guide)
3. **Track offcuts** - Set up Offcut Manager and designated storage area
4. **Review weekly** - Look at scrap reports every week in production meetings
5. **Set targets** - Define scrap reduction goals (e.g., "Reduce from 12% to 9% this quarter")
6. **Act on insights** - When data shows issues, investigate and fix root causes

Additional Resources

- Optimised Production Plans - Plan cuts to minimise waste
- Managing Inventory and Daily Operations - Track offcuts as inventory
- Customising GoSmarter - Set up targets and alerts
- Dashboard - View scrap KPIs at a glance

Scrap reduction begins with measurement. With GoSmarter's tools, you can track, analyse, and systematically reduce waste - improving both profitability and sustainability through data-driven decisions.

Troubleshooting Guide

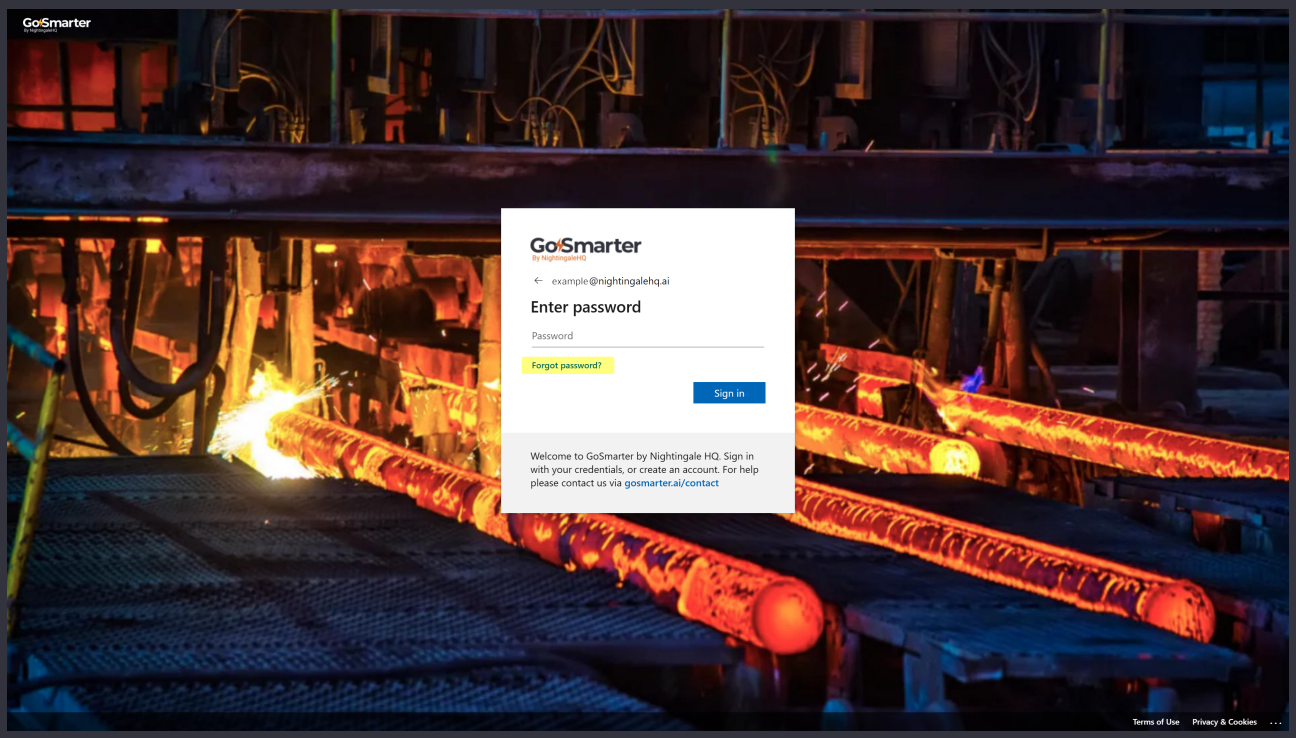
Having problems? This guide helps you solve common issues. Try the solutions in the order listed.

Login Issues

Can't Log In - "Invalid Username or Password"

Try these steps:

1. **Check your email address**
2. Make sure you typed it correctly
3. No extra spaces before or after
4. Check CAPS LOCK is off
5. **Check your password**
6. Passwords are case-sensitive
7. Make sure CAPS LOCK is off
8. Try retyping it carefully
9. **Reset your password**
10. Click "Forgot Password" link
11. Follow the email instructions
12. Create a new password
13. **Contact your administrator**
14. They can verify your account is active
15. They can reset your password if needed



Page Says "Not Authorized" After Login

This means:

- Your account exists but doesn't have permission
- You may not be assigned to a company

What to do:

1. Contact your system administrator
2. They need to assign you to your company
3. They'll set up your permissions

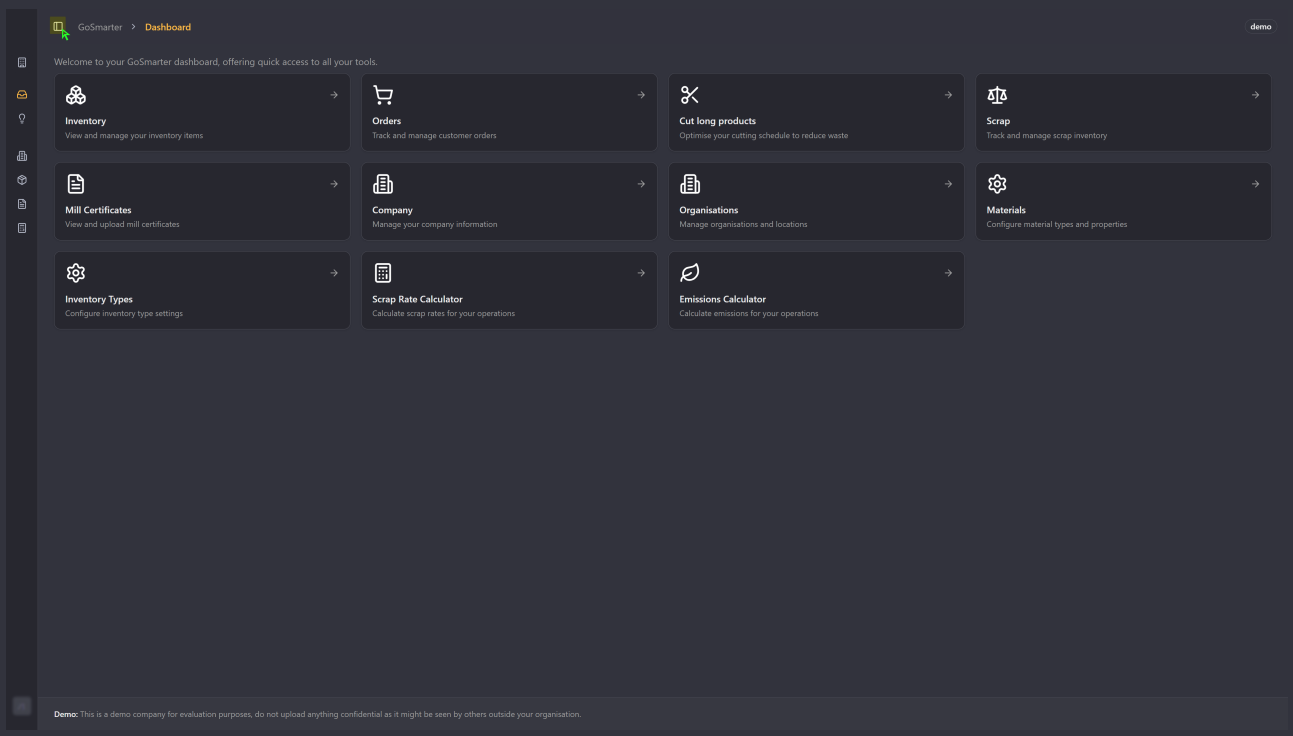
Navigation Problems

Can't See the Sidebar Menu

Try these:

1. **Look for the menu icon**

2. Top left corner
3. Sidebar icon (a square with a rectangle in it)
4. Click it to show the menu
5. **Browser window too small**
6. Make your browser window wider
7. Zoom out if too zoomed in (Ctrl+Minus or Cmd+Minus)



Clicked Something and Nothing Happened

Possible causes:

1. **Page still loading**
2. Wait a few seconds
3. Look for a loading spinner
4. **Need to save first**
5. Click Save button if editing something
6. Then try navigating again
7. **Internet connection issue**
8. Check your internet connection
9. Refresh the page (F5)

Data Display Issues

Can't See Any Data / Empty Lists

Common causes and fixes

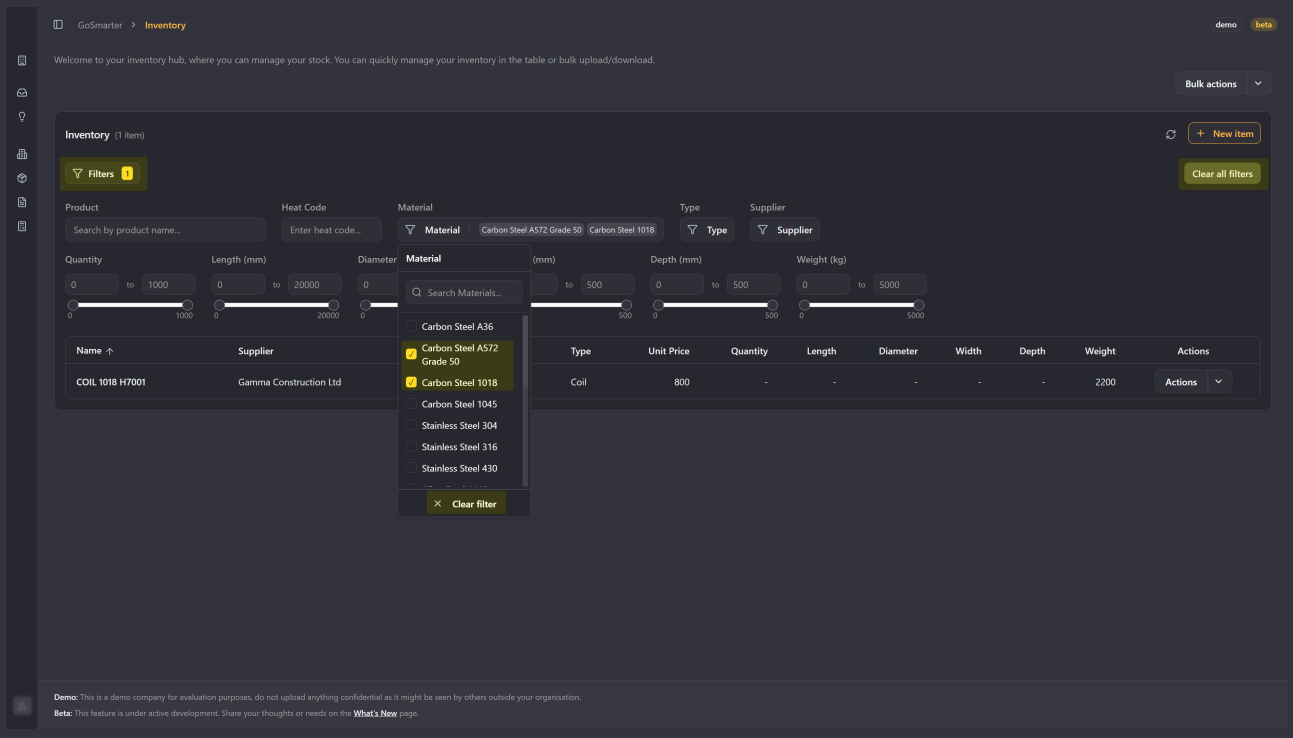
Wrong company selected

- Look at company selector in sidebar
- Click it and select the correct company
- Data will reload automatically

Having the wrong company selected is the #1 cause of "missing data"!

Filters are active

- Look for active filter indicators
- Click "Clear Filters" or "Reset"
- All data should appear



Search box has text

- Look at the search box at the top

- Clear any text in it
- Press Enter or click X

No data exists yet

- If you're new to the system, lists start empty
- You need to add data first

Data Looks Wrong or Outdated

Try these:

1. **Refresh the page**
2. Press F5
3. Or click browser refresh button
4. Or navigate away and back
5. **Check you're on right company**
6. Verify company selector
7. Switch if needed
8. **Clear your browser cache**
9. Ctrl+Shift+Delete (Windows)
10. Cmd+Shift+Delete (Mac)
11. Select "Cached images and files"
12. Click Clear

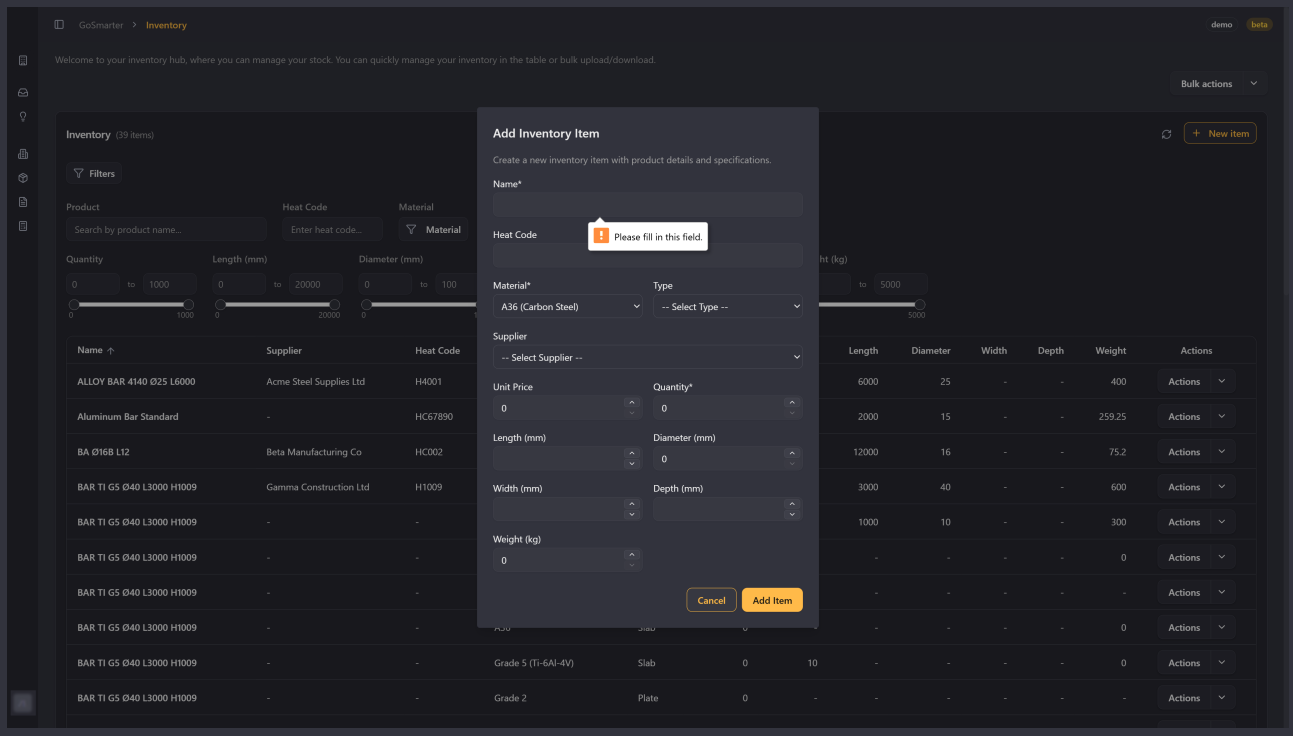
Saving and Editing Problems

"Save" Button Doesn't Work

Check these:

1. **Required fields missing**
2. Look for red outlines on fields
3. Look for error messages in red text

4. Fill in all required fields (often marked with *)
5. **Invalid data entered**
6. Numbers in wrong format
7. Dates in wrong format
8. Check error messages for guidance
9. **Internet connection lost**
10. Check your connection
11. Try saving again



Changes Disappeared After Saving

This usually means:

- The save didn't actually work
- Look for error messages
- Check required fields were filled
- Try again more carefully

Prevention:

- Wait for "Saved successfully" message before leaving page

- Don't click browser back button while saving

Can't Edit or Delete Something

Possible reasons:

1. **Item is being used elsewhere**
2. Example: Can't delete inventory that's in an optimization
3. Example: Can't delete order that's linked to a cutting plan
4. You may need to remove links first
5. **Don't have permission**
6. Contact your administrator
7. Your account may need different permissions
8. **Item is locked**
9. Some completed items can't be edited
10. Create a new one instead

Upload Problems

Upload Button Does Nothing

Try these:

1. **Check file type**
2. Make sure it's an accepted format
3. PDF for certificates
4. Excel (.xlsx) for data uploads
5. Images (JPG, PNG) for photos
6. **File too large**
7. Maximum is usually 10MB
8. Compress or resize the file

9. Try again
10. **Browser popup blocker**
11. Allow popups from GoSmarter
12. Check browser settings

Upload Failed with Error

Common errors

"Invalid file format"

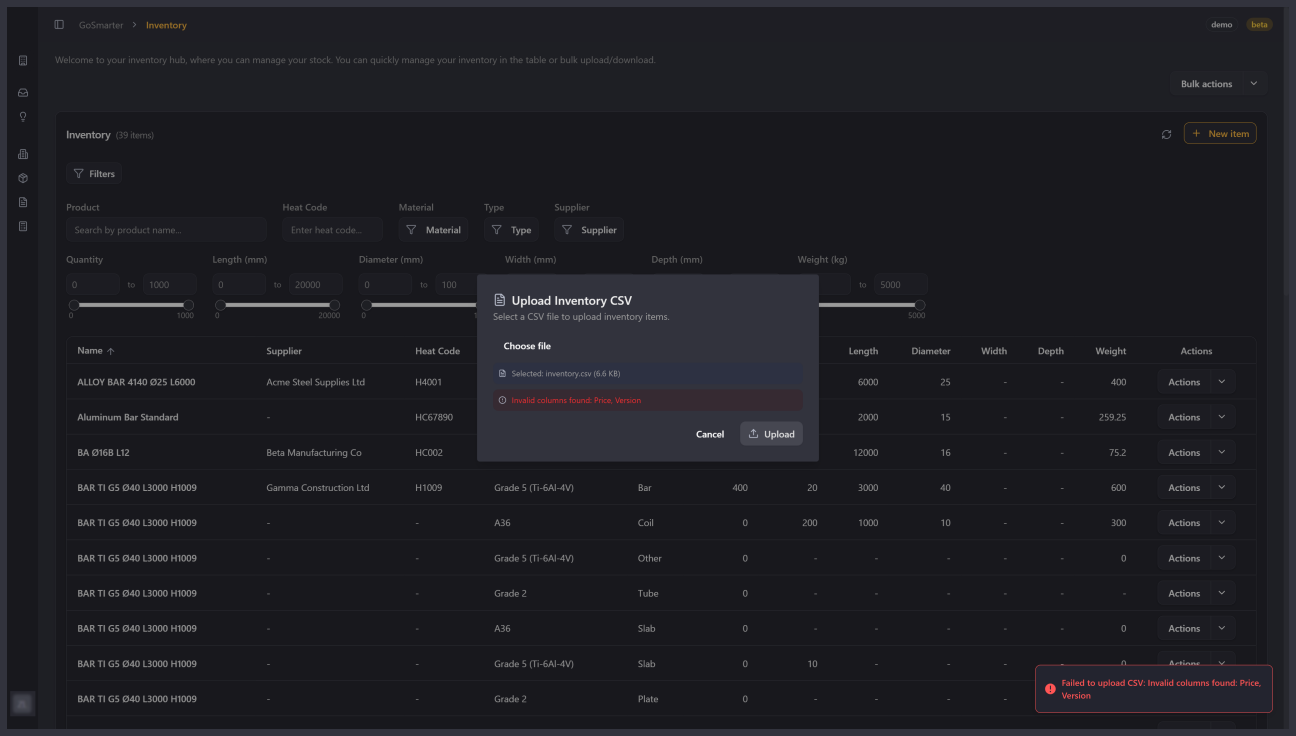
- Wrong file type
- Use the correct format (PDF, Excel, etc.)

"Missing required columns"

- For data uploads (inventory, orders)
- Download the template again
- Don't change column names
- Fill it correctly

"Duplicate entries"

- Some items already exist
- Check for duplicates in your file
- Or in the existing data



Template Download Not Working

1. **Popup blocked**
2. Allow popups for this site
3. Try downloading again
4. **Download to wrong location**
5. Check your Downloads folder
6. Check browser download settings

Optimization Problems

Optimization Won't Run

Check these:

1. **No inventory selected**
2. You must select inventory bars
3. Click inventory selector

4. Choose material and diameter
5. **No orders selected**
6. You must select at least one order
7. Check order checkboxes
8. Make sure they match the inventory material
9. **Inventory and orders don't match**
10. Material types must match
11. Diameters must match
12. Select matching items

Optimization Failed or Gave No Results

Common causes

"Not enough inventory"

- Orders need more material than you have
- Add more inventory
- Or reduce order quantities

"No compatible matches"

- Order lengths too long for inventory bars
- Order material/diameter doesn't match inventory
- Check specifications match

"Calculation timeout"

- Very complex optimization
- Try selecting fewer orders
- Run multiple smaller optimizations

Cutting Plan Results Don't Make Sense

Review these:

1. **Check the cutting patterns carefully**

2. Read each pattern
3. Verify the math
4. Check units (should be mm)
5. **High waste percentage**
6. May be unavoidable for these lengths
7. Try the scrap calculator to verify
8. Consider different inventory bars
9. **Download and review offline**
10. Sometimes easier to review in Excel
11. Print and check manually

Search and Filter Problems

Search Not Finding Items

Try these:

1. **Check spelling**
2. Type carefully
3. Try partial matches (e.g., "Grade" instead of "Grade 250")
4. **Clear other filters**
5. Active filters might hide the item
6. Clear all filters first
7. Then search again
8. **Different company**
9. Verify correct company selected
10. Item might be in different company's data

Too Many Results

Narrow it down

1. Use filters together with search
2. Be more specific in search
3. Sort by relevant column

Performance Problems

Page Loading Slowly

Try these:

1. **Check internet speed**
2. Run a speed test
3. Contact IT if very slow
4. **Close other browser tabs**
5. Each tab uses memory
6. Close unnecessary ones
7. **Clear browser cache**
8. See instructions under "Data Looks Wrong" above
9. **Try different browser**
10. Chrome, Edge, or Firefox work best
11. Update to latest version

System Feels Sluggish

Quick fixes:

1. **Logout and login again**
2. Clears temporary data

3. Refreshes connection
4. **Restart your browser**
5. Close completely
6. Open again
7. **Restart your computer**
8. If problem persists
9. Clears all caches

Certificate Problems

Can't View Certificate PDF

Try these:

1. **Download it first**
2. Don't try to view in browser
3. Download and open with PDF reader
4. **Install PDF reader**
5. Adobe Reader (free)
6. Browser PDF viewer
7. Windows/Mac built-in viewers
8. **File corrupted**
9. Ask for original certificate
10. Upload again

Certificate Won't Link to Inventory

Check these:

1. **Material types match**
2. Certificate grade matches inventory grade

3. Can't link Grade 250 cert to Grade 500 inventory
4. **Already linked elsewhere**
5. One certificate can link to multiple items
6. But check if it's already linked correctly

Browser Compatibility

GoSmarter Works Best With

- ✅ **Google Chrome** (recommended)
- ✅ **Microsoft Edge** (recommended)
- ✅ **Mozilla Firefox**
- ✅ **Safari** (Mac/iOS)
- ⚠️ **Internet Explorer** - IE is no longer supported in general, and will not function correctly

Update your browser:

- Use the latest version for best experience
- Auto-updates usually handle this

When All Else Fails

If you've tried everything and still have problems:

Step 1: Document the Issue

Write down:

- What you were trying to do
- What you clicked
- Exact error message (take screenshot)

- What company you're working with
- What time it happened

Step 2: Try These General Fixes

1. **Logout completely**
2. Click your name → Sign Out
3. Close browser completely
4. Open browser again
5. Login again
6. **Try incognito/private window**
7. Ctrl+Shift+N (Chrome/Edge)
8. Cmd+Shift+N (Safari)
9. Tests without cache/cookies
10. **Try different browser**
11. If Chrome doesn't work, try Edge
12. Helps identify if it's browser-specific
13. **Try different computer**
14. If available
15. Helps identify if it's your device

Step 3: Contact Support

Reach out to:

- Your system administrator
- IT support desk
- Provide all documentation from Step 1

They'll need to know:

- Your username/email
- Which company you're working with
- What you were doing when the problem occurred
- Error messages (screenshots help!)

- Steps you've already tried

Preventing Problems

Good habits to avoid issues:

1. ✅ Always verify correct company is selected
2. ✅ Save work regularly
3. ✅ Clear filters when done
4. ✅ Keep browser updated
5. ✅ Don't use browser Back button while editing
6. ✅ Wait for "Save successful" messages
7. ✅ Double-check data before clicking Delete
8. ✅ Keep paper backups of important information
9. ✅ Download important results (cutting plans, etc.)
10. ✅ Log out when leaving for the day

Quick Diagnostic Checklist

Use this to troubleshoot any problem:

-

-

-

-

-

Error Messages Explained

Error Message	What It Means	How to Fix
"Unauthorized"	No permission to access	Contact administrator
"Not Found"	Item doesn't exist or was deleted	Check company selection
"Invalid Input"	Data format wrong	Check field requirements
"Connection Failed"	Internet problem	Check connection, try again
"Session Expired"	Been idle too long	Log in again
"Duplicate Entry"	Item already exists	Check existing data

Don't hesitate to ask your administrator for help. That's what they're there for!

Generating Optimised Production Plans (Cutting & Scheduling)

This guide is designed for production planners, scheduling managers, and operations leads who organize the daily or weekly manufacturing schedule - particularly those planning cutting of long products (rebar, beams, pipes, etc.). Learn how to use GoSmarter's Long Product Production Planning feature to create first-draft cutting plans that minimise waste and meet order requirements efficiently.

Overview

The Challenge

Planning cutting sequences to fulfill orders with minimal scrap is complex:

- **Manual planning takes hours** - Calculating optimal combinations of cuts from available stock
- **Suboptimal patterns waste material** - Without optimisation, scrap rates can be unnecessarily high
- **Changing requirements complicate planning** - Late orders, stock changes, or rush jobs disrupt carefully planned schedules
- **Difficult to balance competing goals** - Minimise scrap, meet deadlines, use available stock efficiently

How GoSmarter Automates This

GoSmarter's AI-powered Production Planner:

- **Computes optimal plans in minutes** - What might take hours manually is done automatically
- **Minimises scrap** - Intelligent algorithms find the most efficient cutting patterns
- **Handles complexity** - Manages multiple orders, different stock lengths, and various constraints simultaneously
- **Provides flexibility** - Planners can review, adjust, and re-optimise as needed

In trials, users achieved 50% scrap reduction when using GoSmarter's automated planning vs. manual planning. This demonstrates the optimisation is not just faster, but significantly more effective.

Scope

This tool is specifically designed for **long products** - materials where length is a primary dimension: - Rebar (reinforcing steel bars) - Structural beams (I-beams, H-beams, etc.) - Pipes and tubes - Bar stock - Profiles and sections

The tool creates a **suggested cutting schedule** which planners can review and adjust before execution.

Preparing Input Data

Before generating a production plan, ensure the required data is in GoSmarter:

1. Open Orders

The planner needs to know what you need to produce:

1. Navigate to **Orders** (see Orders Management Guide)
2. Verify all orders for the planning period are entered:
3. Required lengths and quantities
4. Material specifications (grade, diameter, etc.)
5. Due dates
6. Any special requirements
7. Mark orders as "Ready for Planning" or similar status

Tip: If you have many orders to enter, use the bulk upload feature (CSV import) to save time.

2. Available Stock Inventory

The planner needs to know what raw materials are available:

1. Navigate to **Inventory** (see Inventory Management Guide)
2. Ensure current stock levels are accurate:
3. Stock lengths available (e.g., how many 12m bars you have)

4. Material types and grades
5. Quantities on hand
6. Update any recent deliveries or usage

The plan's quality directly depends on accurate input data. If inventory levels or order details are wrong, the plan will be suboptimal. Make it a practice to verify data accuracy before running the planner.

Running the Plan Generation

Once input data is ready:

Step-by-Step: Generate a Production Plan

1. Navigate to **Production Planning → Cut long products**
2. Click **+ New Plan** or **Generate Plan**
3. Configure plan parameters:
4. **Date range** - Which orders to include (e.g., "Orders due this week")
5. **Stock selection** - Which inventory to consider (e.g., "All available rebar stock")
6. **Optimisation goal** - Minimise scrap (default), minimise cuts, or balanced
7. **Constraints** - Any special rules or priorities
8. Click **Generate Plan**
9. Wait for processing (typically 30 seconds to 2 minutes depending on complexity)

Large or complex plans (many orders, many stock options) may take a couple of minutes to compute. This is still dramatically faster than manual planning, which could take hours for the same work. The system is doing thousands of calculations to find the optimal solution.

What Happens During Generation

GoSmarter's AI:

1. **Analyses all orders** - Understands required lengths, quantities, materials
2. **Evaluates stock options** - Considers all available stock items
3. **Calculates combinations** - Determines how to cut each stock piece to fulfill orders
4. **Optimises for minimal waste** - Finds patterns that minimise leftover scrap
5. **Handles constraints** - Respects priorities, deadlines, material requirements

6. **Produces cutting instructions** - Generates a detailed plan of which cuts to make

The result is a comprehensive cutting schedule optimised for efficiency.

A scrap rate under 2.5% is generally excellent for most cutting operations. Rates above 5% suggest either: - Suboptimal stock lengths for your typical orders - Complex order mix requiring difficult combinations - Opportunity to source different standard lengths

Use the Scrap Calculator (see Scrap Guide) to analyse and improve.

Reviewing and Editing the Plan

The Planner as a Suggestion Tool

Important: GoSmarter provides an optimised **suggestion**. Experienced planners should review and can adjust based on:

- Shop floor realities (machine availability, operator skills)
- Material considerations (prefer using older stock first, etc.)
- Schedule constraints (certain orders need to go first)
- Quality requirements (specific heats for certain customers)

The AI handles the complex maths; you add the practical expertise.

Executing the Plan

Sharing the Plan with Production

Once you've reviewed and are satisfied with the plan:

1. Click **Approve Plan** or **Finalise**
2. Choose output format:
3. **Print** - Physical paper for shop floor
4. **PDF** - Digital document to email or display on screens
5. **CSV** - Data export for other systems (e.g., CNC machine programming)

The plan document includes: - Cutting instructions for each stock item - Visual diagrams (if configured) - Order references - Material specifications - Any notes or special instructions

Communicating to the Shop Floor

Best Practices:

1. **Provide clear instructions** - Ensure cutting operators understand the plan format
2. **Highlight priorities** - Mark urgent or special orders clearly
3. **Include contact** - Note who to ask if there are questions or issues
4. **Support visuals** - Diagrams help operators quickly understand complex cuts

Example Shop Floor Instruction:

```
Job: Plan #2025-01-30-A
Date: January 30, 2025
Operator: Cutting Team A

Stock #1001 (12m bar, B500C 12mm):
  Cut 4 pieces @ 3m each → Label for Order #245
  Scrap: None

Stock #1002 (12m bar, B500C 12mm):
  Cut 4 pieces @ 3m each → Label for Order #245
  Scrap: None

... [continue for all stock items]

NOTES:
- Order #245 is PRIORITY - complete first
- Keep offcuts over 1.5m in offcut storage area
- Update inventory in GoSmarter after cutting
```

Integration with Other Systems

If you have automated cutting machines or other shop floor systems:

- **CNC machines** - Export cutting patterns in machine-compatible format
- **Label printers** - Automatically print labels for cut pieces
- **Scheduling software** - Export as task list for production scheduling
- **ERP systems** - Update production status via API or file export

Consult GoSmarter support for integration options specific to your equipment.

Monitoring and Feedback

Updating During Execution

As the plan is executed:

1. **Mark completed cuts** - Check off stock items as they're processed
2. **Log actual scrap** - Record real scrap vs. planned (for analysis)
3. **Note deviations** - If the plan couldn't be followed exactly, document why

This feedback helps: - Track progress on the plan - Understand differences between planned and actual - Improve future planning (e.g., if machine constraints weren't accounted for)

Best Practices for Production Planning

1. Run the Planner Consistently

Recommendation: Run the planner at the same time each day (or week) with the latest data.

Benefits: - Establishes a routine - Ensures plans are based on current orders and stock - Allows production team to expect and prepare for new plans

Example Schedule: - Every morning at 8 AM: Review new orders, update inventory - 8:30 AM: Run planner for the day's production - 9 AM: Distribute plan to shop floor, production starts at 9:30 AM

2. Maintain Accurate Stock Data

The plan is only as good as the inventory data:

- Update stock levels immediately when new deliveries arrive
- Record usage after each production run
- Regular physical stocktakes to verify data accuracy
- Investigate and correct discrepancies quickly

See: Inventory Management Guide for best practices.

3. Use Actual Scrap Data to Improve

After executing plans:

1. Compare planned scrap vs. actual scrap
2. If actual is consistently higher than planned, investigate:
3. Are there cutting inefficiencies (blade waste, operator practices)?
4. Is stock quality causing more waste than expected?
5. Are machines calibrated correctly?
6. Use insights to:
7. Improve shop floor processes
8. Provide better input parameters to planner
9. Adjust stock purchasing

See: Scrap Reduction Guide for detailed scrap analysis.

4. Handle Late/Rush Orders Strategically

Option A - Separate Quick Plan: - For a single urgent order, run a quick plan just for that order - Use available stock, accept slightly higher scrap if necessary for speed - Execute immediately

Option B - Re-Optimise Full Plan: - Add the urgent order to the full order list - Re-run the complete plan to re-optimise everything including the rush job - Better overall efficiency, but takes a bit more time

Choose based on urgency vs. efficiency trade-off.

5. Communicate Changes Clearly

If a plan changes after distribution:

- **Clearly mark changes** - Highlight what's different (new plan version number, change notes)
- **Notify affected operators** - Don't assume they'll notice the update
- **Provide rationale** - Brief explanation helps acceptance ("New order added for VIP customer")

6. Review Plan Quality Periodically

Monthly or quarterly, review planning performance:

- Average scrap rate on plans vs. actual

- Percentage of plans executed as-is vs. modified
- Time saved vs. manual planning (if measurable)
- Material cost savings from optimized planning

Use this data to: - Justify continued use of the tool to management - Identify opportunities for further improvement - Recognize and reward teams for effective planning and execution

FAQ / Troubleshooting

Common Questions

Q: What if the plan doesn't include all my orders?

A: Check: 1. Are all orders marked as "Ready for Planning"? Some might be in draft status. 2. Is the date range correct? Orders outside the selected range won't be included. 3. Is there sufficient stock? If you don't have stock that matches order material specs, those orders can't be planned. 4. Are filters applied? Ensure you haven't inadvertently filtered out certain orders.

If an order still isn't included, review its details - there may be a data issue preventing it from being planned.

Q: The suggested scrap is still high, what can I do?

A: 1. **Review stock lengths** - The available stock may not match well with order requirements. Consider ordering different standard lengths. 2. **Combine with offcuts** - Ensure the planner has access to available offcut inventory; using offcuts can reduce scrap. 3. **Check for small orders** - Very small or odd-sized orders may be inherently wasteful. See if they can be combined with future orders or if customer can accept standard sizes. 4. **Re-optimise with different constraints** - Try allowing the planner to use different stock, or adjusting priorities.

If scrap remains high, use the Scrap Calculator (see Scrap Guide) to analyze and understand why.

Q: Does the planner account for machine capacities or multiple machines?

A: - Current version primarily optimises cutting patterns, not machine scheduling - If you have multiple cutting machines, you may need to: - Manually split the plan across machines based on capacity - Run separate plans for each machine's workload - For complex multi-machine scheduling, contact GoSmarter support about advanced features or integrations

Q: Can I save and reuse plans?

A: Yes: 1. Approved plans are saved in the system 2. You can view past plans under **Plans → History** 3. Plans can be duplicated/reused if you have similar repeating orders 4. This is useful for regular production runs (e.g., weekly standing orders)

Q: What if I need to plan for different products (not just one material type)?

A: - The planner can handle multiple material types in a single run - It will keep materials separate (won't suggest cutting rebar from beam stock, for example) - For very diverse product mixes, you might run separate plans per product category for clarity

Q: How do I give feedback to improve the planner?

A: - GoSmarter continuously improves the AI based on real-world usage - If you notice patterns that aren't optimal, or have suggestions: - Document specific examples (save the plan, note the issue) - Contact GoSmarter support with your feedback - Your input helps improve the system for everyone

Q: Can I override the AI completely and plan manually in the system?

A: Yes: - You can enter a plan manually without using the optimiser - This might be useful for very special cases or small jobs - However, you'll miss the optimisation benefits - Most users find the best approach is: let AI suggest, then manually adjust as needed

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Advanced Tips & Tricks

Power User Techniques

1. Planning Strategies for Different Scenarios:

High-Mix, Low-Volume: - Many different orders, small quantities each - Strategy: Group orders by material grade/size, run separate plans per group - Reduces plan complexity while still optimising each group

Low-Mix, High-Volume: - Few order types, large quantities - Strategy: Run full optimisation across all orders; savings from efficiency multiply with volume

Rush Jobs Mixed with Regular: - Some urgent, some standard schedule - Strategy: Plan urgent separately for speed, then plan regular jobs optimally

2. Using Historical Plans:

- Review past successful plans for similar order mixes
- If you have recurring orders, save high-performing plans as templates

- This can speed up planning for repeat business

3. Stock Management Insights:

- After several planning cycles, analyse which stock lengths are most versatile
- Consider standardising on 2-3 stock lengths that handle 80% of your orders efficiently
- This simplifies inventory and improves optimisation potential

4. Collaborative Planning:

- Have both planning team and shop floor supervisors review plans together periodically
- Shop floor can provide feedback on practicality; planners can explain optimisation rationale
- This builds mutual understanding and improves both planning and execution

Integration with Other GoSmarter Features

Complete Workflow Example

End-to-End Use of GoSmarter for Production:

1. **Orders received** → Entered in Orders module
2. **Material arrives** → Added to Inventory with linked Mill Certificates
3. **Planning time** → Run Production Planner with orders and inventory
4. **Optimised plan generated** → Review and approve
5. **Execute cutting** → Shop floor follows plan
6. **Log actual scrap** → Record real waste in Scrap Logger
7. **Update inventory** → Used stock depleted, offcuts added
8. **Analyse performance** → Review scrap reports, compare planned vs. actual
9. **Continuous improvement** → Use insights to improve future planning and processes

Linked Guides: - Inventory Management - Manage stock and offcuts - Mill Certificates - Link certificates to materials for compliance - Scrap Management - Log and analyse scrap - Customising GoSmarter - Advanced features and configurations

This integrated approach maximises the value of GoSmarter across your operation.

Next Steps

To start using GoSmarter's Production Planning effectively:

1. **Ensure data quality** - Review and clean up Orders and Inventory data
2. **Learn the interface** - Run a few test plans with sample data to understand outputs
3. **Start with simple plans** - Begin with one product type or day's orders, expand as you gain confidence
4. **Establish routine** - Set a regular planning schedule and stick to it
5. **Measure and improve** - Track scrap rates, compare planned vs. actual, refine your process

Additional Resources

- Inventory Management - Ensure accurate stock data
- Orders Management - Enter and manage production orders
- Scrap Reduction - Analyze and minimize waste
- Dashboard - Monitor key production planning metrics
- Troubleshooting - Solutions to common issues

GoSmarter's Production Planner does the complex optimisation math in minutes, freeing you to focus on strategy, quality, and continuous improvement. Start planning smarter today and watch your scrap rates - and costs - drop.

Customising GoSmarter and Advanced Tips

This guide is designed for system administrators, power users, and anyone who wants to configure GoSmarter to fit their organisation's specific needs and leverage advanced features. Learn how to customise settings, manage users, use advanced tools, and get the most out of GoSmarter beyond the basic process guides.

Overview

Why Customise GoSmarter?

While GoSmarter works well out-of-the-box, customisation allows you to:

- **Align with your workflows** - Adapt the system to how your organisation operates
- **Improve user experience** - Configure what each team sees and can do
- **Unlock advanced value** - Use features like APIs and calculation tools
- **Maximise ROI** - Get more value by fully utilising all capabilities

GoSmarter is built to be flexible. This guide helps you "make GoSmarter your own."

What You'll Learn

This guide covers:

1. User management and permissions
2. Custom fields and data organisation
3. Integration and API usage
4. Free calculation tools (Shape Code, Emissions, etc.)
5. Staying updated with new features
6. Advanced tips and power user techniques

If you're responsible for managing GoSmarter for your organisation, this guide will help you configure it optimally and support your users effectively.

User Management & Permissions

Currently users must be reviewed and assigned by GoSmarter support. Please contact support to manage users.

Once people are allocated to the organisation they can perform day-to-day activities within the application.

Billing and subscription management is handled separately via the GoSmarter sales team.

Integration & API Usage

Why Integrate GoSmarter?

GoSmarter may be one of several systems in your IT ecosystem. Integration allows:

- **Data sync** - Keep GoSmarter data aligned with ERP, accounting, etc.
- **Automated workflows** - Trigger actions in other systems based on GoSmarter events
- **Custom reporting** - Pull GoSmarter data into business intelligence tools like Power BI
- **Extended functionality** - Build custom applications on top of GoSmarter

API Overview

GoSmarter provides a RESTful API for programmatic access:

- **Read data** - Fetch inventory, orders, certificates, scrap logs, etc.
- **Write data** - Create or update records from external systems
- **Real-time sync** - Keep data current between systems
- **Custom integrations** - Build exactly what you need

API usage requires programming/scripting knowledge. If you're not technical, work with your IT team or contact GoSmarter support for integration assistance.

Getting Started with the API

1. API Documentation:

- Access docs at api-docs.gosmarter.ai
- Review authentication, endpoints, request/response formats

- Documentation includes:
- Available endpoints (URLs for different data types)
- Request formats (how to query data)
- Response formats (what you'll get back)
- Authentication methods (how to use your API key)
- Example code (Python, JavaScript, curl, etc.)

Common Integration Use Cases

1. Sync with ERP System: - Automatically import new purchase orders from ERP into GoSmarter Orders - Export production completion data from GoSmarter back to ERP for invoicing - Keep inventory levels synchronized

2. Power BI Dashboards: - Daily automated pull of scrap data into Power BI - Create executive dashboards showing scrap trends, production efficiency, etc. - Combine GoSmarter data with financial data for comprehensive business intelligence

3. Automated Alerts: - Script checks GoSmarter API for low stock levels every hour - Sends email or SMS alerts to purchasing team when stock is low - More responsive than waiting for users to check the system

4. Custom Mobile App: - Build a simple mobile app for shop floor operators - Uses GoSmarter API to display today's production plan - Allows operators to log scrap completion directly from phones/tablets

Begin with read-only integrations (pulling data for reports) before attempting complex read-write sync. This minimizes risk while you learn the API.

Utilising Free Tools

GoSmarter provides several free calculation tools that add value even beyond the core platform:

Emissions Calculator

Quantify the carbon footprint of your steel usage:

1. Navigate to **Tools → Emissions Calculator**
2. Enter parameters:
3. Material type (different steel grades have different footprints)

4. Quantity (weight in kg/tons or number of pieces with dimensions)
5. Production method (if known - virgin steel vs. recycled content)
6. Click **Calculate**
7. View estimated CO2 equivalent emissions

[Image: Emissions calculator showing material input, quantity, and calculated carbon footprint - file not found: emissions-calculator.png]

Use Cases:

Sustainability Reporting: - Calculate total emissions from monthly/annual steel use - Track progress on carbon reduction goals - Report for ESG (Environmental, Social, Governance) compliance

Supplier Comparison: - Compare carbon footprint of steel from different suppliers - Factor environmental impact into purchasing decisions

Customer Communication: - Provide customers with carbon footprint data for their projects - Support customers' own sustainability reporting

Scrap Reduction Benefits: - Quantify environmental benefit of reducing scrap - Example: Reducing scrap by 10 tons/year = ~20 tons CO2 saved - Makes the business case for efficiency investments even stronger

Use the Emissions Calculator alongside scrap tracking to demonstrate both financial and environmental benefits of GoSmarter. This supports sustainability initiatives and can be a differentiator in customer communications.

How to Access Free Tools

As a GoSmarter Customer: - Tools are integrated in the main menu: **Utilities** section

As a Non-Customer: - Visit the GoSmarter app - Access calculators without login - Results are not saved - Great for trying GoSmarter before committing

Staying Updated with New Features

GoSmarter is continuously evolving. New features and improvements are released regularly.

How to Stay Informed

You can subscribe to release notes at change.gosmarter.ai/ or check the **What's new** section in the application.

Proactive Feature Adoption

Make it a practice to:

1. **Monthly review** - Spend 15 minutes reading latest release notes
2. **Identify relevance** - Which new features apply to your operation?
3. **Test new features** - Try them on non-critical data first
4. **Train users** - Share relevant updates with your team
5. **Provide feedback** - Let GoSmarter know what works and what could be better

This ensures you're continuously getting more value from the platform, not just using the same features year after year.

Advanced Tips & Tricks

Power User Techniques

1. Bulk Operations: - For repetitive tasks, use bulk edit/update features - Example: Select multiple inventory items and update their location at once - Much faster than editing individually

2. Save Filters and Views: - Bookmark frequently-used filter combinations - Example: "My urgent orders", "Low stock items", "Pending certificates"

3. Data Export/Import: - Use CSV export/import for bulk data operations - Example: Export inventory, make bulk changes in Excel, re-import - Faster than web forms for large datasets - Be cautious: verify data before import to avoid errors

4. Multi-Tab Workflow: - Open GoSmarter in multiple browser tabs - View reference data in one tab while entering new data in another - Example: Have production plan in one tab, inventory in another, update both in parallel

Admin Efficiency Tips

1. Regular Data Quality Audits: - Monthly: Run data quality reports (duplicates, missing data, etc.) - Quarterly: Review and clean up old, inactive records - Maintain high data quality for better system performance and user experience

2. User Training Schedule: - New user onboarding: Show them their role-specific features only (avoid overwhelming) - Quarterly refresher: Share new features, best practices - Just-in-time training: When a new feature launches, train relevant users immediately

3. Backup and Recovery Plan: - Understand GoSmarter's backup procedures (ask support if unclear) - Know how to request data restoration if needed - Document your customisations (custom fields, roles, etc.) so they can be recreated if necessary

4. Performance Monitoring: - Watch for slow performance or errors - Report issues to support promptly - Keep track of system usage patterns (e.g., peak times) for planning

5. Change Management: - When making significant configuration changes, communicate to users beforehand - Test changes in non-production environment if possible - Have a rollback plan if a change causes issues

FAQ / Troubleshooting

Common Questions

Q: Can GoSmarter do [specific feature]?

A: - Check documentation or see the in-app **Help guides** - If not found, contact support with your specific use case - GoSmarter is actively developed; even if a feature doesn't exist, it might be planned

Q: How do I request a new feature?

A: - Go to **What's new** and navigate to the feedback section - Describe your need and use case - GoSmarter works closely with manufacturers; customer input heavily influences roadmap - You may be contacted for more details or to participate in beta testing

Q: What if my company's process is slightly different from GoSmarter's default workflow?

A: Two approaches: 1. **Adapt GoSmarter:** Use custom fields, tags, and configuration to bend the tool to your process 2. **Adapt your process:** Sometimes the "GoSmarter way" may actually be a best practice; consider if adjusting your process makes sense

Often a hybrid approach works best. Contact support for guidance specific to your situation.

Q: Can I access GoSmarter from multiple locations/devices?

A: Yes: - Cloud-based, accessible from anywhere with internet - Use on desktop, laptop, tablet, mobile - Login from office, shop floor, home office, etc. - Data is synchronised in real-time

Q: What if we have multiple plants/locations?

A: - GoSmarter supports multi-location organisations - Can separate data by location or consolidate - depends on your preference - Contact support to configure for your structure

Q: Is multi-language support available?

A: - This is planned for future releases

Q: How do I measure the ROI of GoSmarter for our organisation?

A: Track: - **Time savings:** Hours saved on manual tasks (planning, certificate searching, etc.) - **Material savings:** Scrap reduction value - **Error reduction:** Fewer mistakes, rework, customer complaints - **Compliance benefits:** Faster audits, avoided penalties

Quantify before and after using GoSmarter to calculate ROI. GoSmarter support can help with ROI analysis.

Making GoSmarter Your Own: Summary

Key Takeaways

1. **Customisation** - Use custom fields and tags to fit GoSmarter to your specific needs
2. **Integration** - Leverage APIs to connect GoSmarter with your broader IT ecosystem
3. **Free Tools** - Use Shape Code, Weight, and Emissions calculators for added value
4. **Stay Current** - Regularly review new features and adopt those that benefit you
5. **Power User Practices** - Employ advanced techniques to maximise efficiency

By investing time in customisation and learning advanced features, you'll get far more value from GoSmarter than just using it "as is."

Next Steps

To make GoSmarter truly your own:

1. **Audit your current setup** - Review users, permissions, custom fields

2. **Identify gaps** - What's missing that would make GoSmarter more useful?
3. **Prioritise customisations** - Start with highest-impact changes
4. **Implement gradually** - Don't overwhelm users with too many changes at once
5. **Gather feedback** - Ask users what would improve their experience
6. **Iterate** - Continuous improvement applies to system configuration too

Additional Resources

- Managing Inventory and Daily Operations - Core inventory features
- Digitising Mill Certificates - Certificate management
- Tracking and Reducing Scrap - Scrap management
- Optimised Production Plans - Production planning
- Getting Started - Basic GoSmarter navigation
- Troubleshooting - Solutions to common issues

GoSmarter provides the tools; you configure it to fit your unique operation. Take advantage of customisation options to maximise efficiency, improve user adoption, and drive better business results.

Integration Strategy

At Nightingale HQ, we understand that every manufacturing business has unique systems and workflows. Our integration strategy is designed to meet you where you are and grow with your needs without forcing expensive system replacements or lengthy implementation projects.

The Crawl, Walk, Run Approach

We believe in progressive integration that lets you start quickly and scale at your own pace.

Crawl: Independent Use

Start using GoSmarter immediately through our intuitive web interface. No integration required, just log in and begin:

- Access all core features through the browser-based platform
- Manage inventory, orders, and production planning independently
- Try features risk-free without touching your existing systems
- Perfect for testing, pilot projects, or departments starting digital transformation

Best for: Getting started quickly, evaluating the platform, departmental use or small business use

Walk: Import & Export

When you're ready to connect data between systems, use our built-in import and export tools:

- **Import data** from CSV files from other systems or spreadsheets
- **Export results** to share with other systems or teams
- Periodically update data with semi-manual synchronisation by importing/exporting within the platform
- Full control over what data moves and when
- No technical expertise required

Best for: Periodic data sharing, maintaining data sovereignty, simple workflows

Run: API Integration

Achieve full automation with real-time, bidirectional integration:

- Connect GoSmarter directly to your ERP, MES, or other systems
- Automate data flows without manual intervention
- Build custom workflows tailored to your operations
- Access the complete platform programmatically

Best for: High-volume operations, real-time requirements, complex workflows

Integration Tools & Resources

Open APIs

Our REST APIs provide comprehensive access to all platform features:

- **Available at no additional cost** to all customers
- Complete documentation with examples
- Authentication and security best practices
- Rate limits designed for production use

Access API Documentation →

Developer Centre

A complete resource hub for technical teams:

- Interactive API explorer and sandbox
- Integration guides and tutorials
- Best practices and design patterns

Visit Developer Centre →

MCP Server

For modern integration architectures, we offer a Model Context Protocol (MCP) server:

- Standardised protocol for AI agent integration

- Enable conversational interfaces to GoSmarter data
- Build custom AI assistants for your operations
- Integrate with Claude, VS Code, and other MCP-compatible tools

Learn about MCP Integration →

Our Integration Philosophy

We Play Nicely

The software landscape is diverse, and we respect that. Your business likely runs on a combination of:

- Established ERP systems (SAP, Microsoft Dynamics, NetSuite, etc.)
- Industry-specific MES or production software
- Custom tools built for your specific needs
- Excel spreadsheets and specialized databases

We don't replace. We complement. Our goal isn't to cost you hundreds or thousands of hours replacing critical systems that, while they may not meet all your needs, are essential to your operations.

Open by Design

- **No integration fees:** Our APIs are included with your subscription
- **Vendor-neutral:** We support integration with any system that can consume REST APIs
- **Your data, your rules:** Export your data anytime, in standard formats

Partnership Approach

As we work with more customers, we encounter different supplier systems and niche software. Our commitment:

1. **Build integration kits** for commonly requested systems
2. **Document integration patterns** for similar tools
3. **Establish partnerships** with your specific vendors when possible
4. **Support your IT team** in building custom integrations

We view integration as a partnership. If you need to connect with a specific vendor system, we'll work with you to make it happen, whether that means providing extra documentation, building connector code, or coordinating directly with your vendors.

Getting Started with Integration

Not sure which approach is right for you? Our team can help assess your needs and recommend the best integration path.

Reach out to us at support@gosmarter.ai

Quick Start Checklist

1. **Start with the interface** - Get familiar with core features
2. **Test import/export** - Move sample data in and out
3. **Review our API docs** - Understand what's possible
4. **Define your integration goals** - What processes need automation?
5. **Connect with our team** - We'll help plan your integration journey

Common Integration Scenarios

Scenario 1: ERP → GoSmarter → Production Floor

- ERP pushes orders via API
- GoSmarter optimises cutting plans
- Results exported to production systems or displayed on tablets

Scenario 2: Hybrid Manual/Automated

- Daily inventory import from your existing system
- Manual planning and optimisation in GoSmarter
- Export cutting lists and reports for your team

Scenario 3: Full Automation

- Real-time bidirectional sync with ERP and MES
- Automated order intake and processing
- Production data flows back to business systems
- Webhook notifications for critical events

Remember: There's no wrong way to integrate with GoSmarter. Whether you use our interface standalone, sync data periodically, or build deep API integrations, we're here to support your journey.