

Manual Hersof Plan

For version 0.3 · updated 6 October 2026

Hersof Plan shows, per machine and per week, how much work is scheduled compared with what the machine can handle. That way you see at a glance where it is too full, where there is still room and whether an order will be ready on time. Part 1 helps the administrator get started. Part 2 explains every screen.

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Part 1 – Quick start for the administrator

Six steps to your first schedule. The most important thing is a correct capacity per machine: everything is calculated from it.

Getting started – as administrator of a new account you see the card *Getting started with Hersof Plan* at the top of **Load**: machines, holidays and leave, your orders and your colleagues, each with one button. What is done gets ticked automatically; the card disappears when everything is done, or with **Hide**.

1 Signing in

1. You receive an email from Hersof: "*You have been invited to Hersof*". Click **Choose my password**, choose a password (at least 6 characters) and click **Set password**.
2. Sign in at hersof.be/login.html. With no machines yet, Plan opens on the **Machines** screen.

The link in the email only works once. Forgotten your password? Enter your email address on the sign-in page and click **Forgotten your password?**.

2 Your machines and their capacity

Go to **Machines**. First create a few **categories** (e.g. Turning, Milling, Welding), then your machines. A "machine" can also be a welder or a workstation.

- **Hours per day** – at the top of Machines, for all machines: 16 h by default, Monday to Friday. If a machine differs (e.g. one shift: 8 h), enter that on the machine.
- **Reserve margin (%)** – what you want to keep free for rush jobs and the unexpected (10 % by default).

Do you also use Hersof Maintenance? Then click **Import from Maintenance**: all machines from Maintenance are added to Plan, linked straight away (see [Together with Maintenance](#)).

3 The calendar

Go to **Calendar** and click **Belgian public holidays** for this year and next. Add your summer shutdown and other closing days (for the whole company or for a single machine). Closed days are deducted from that week's capacity.

4 Your first order

1. Click **New order** (or press **N**). Enter the customer, the **customer purchase order** and the delivery date.
2. Add an **operation** for each step: what (e.g. sawing, turning), on which **machine**, in which **week** and how many **hours**.
3. Click **Save**, or **Save and schedule**: the operations then go straight to the end of their machine's queue and you see the day planning on the start day.

Do you often make the same parts? Then create items with their standard operations: Plan then calculates the hours and suggests the weeks itself.

5 Reading the load

On **Load** you see, per machine and per week, the scheduled hours compared with the capacity: **normal**, **in the reserve margin** or **overbooked**. Click a cell to see which orders are in that week.

6 Inviting colleagues

Click **Users** in the menu on the left, enter the name and email address, choose the access level and the language, and click **Invite**. A **Viewer** is free — handy for a screen in the workshop.

Part 2 – Full manual

Access levels: who can do what?

	ADMINISTRATOR	PLANNER	VIEWER
View schedule, orders and report	✓	✓	✓
Schedule orders and operations, calendar, items, import CSV	✓	✓	–
Machines and categories	✓	–	–
Users and plan	✓	–	–
Counts towards the plan	yes	yes	no – free

One login works in all Hersof apps; in Admin a planner is called a *staff member*, in Maintenance a *technician*.

Adjust it yourself – the administrator can adjust what each access level may do, in **Users** → **What each access level may do** → **Adjust**: e.g. let a planner manage machines and categories, or not let them delete orders. The database checks it itself; the app only shows what is allowed.

The screen

- **Menu on the left:** *Daily*(Load, Orders) and *Management*(Machines, Items, Calendar, Report, Import), and at the bottom Install as app, Users and Sign out. Orders shows the number of open orders.
- **On a phone:** at the bottom Load, Day planning, Queue, Orders and **More** (where you also find Machines and Calendar).
- **Keyboard shortcuts:** **N** = new order, **/** = search, **Esc** = close window.
- Plan works **online only**. If you come back to the window after a while, the data is refreshed automatically. If a colleague has changed the same order in the meantime, nothing is overwritten and you get a message.
- An administrator can adapt the menu: see [Arranging the menu](#).

The buttons at the bottom of a window are always in the same place: on the left **Delete** and related actions, on the right **Close** and the green main button (e.g. **Save**). A recommended next step sits next to Close, with a coloured border (e.g. **Save and schedule**). What you delete without much going with it (a closure, a category) is removed straight away, with **Undo** in the message.

Arranging the menu

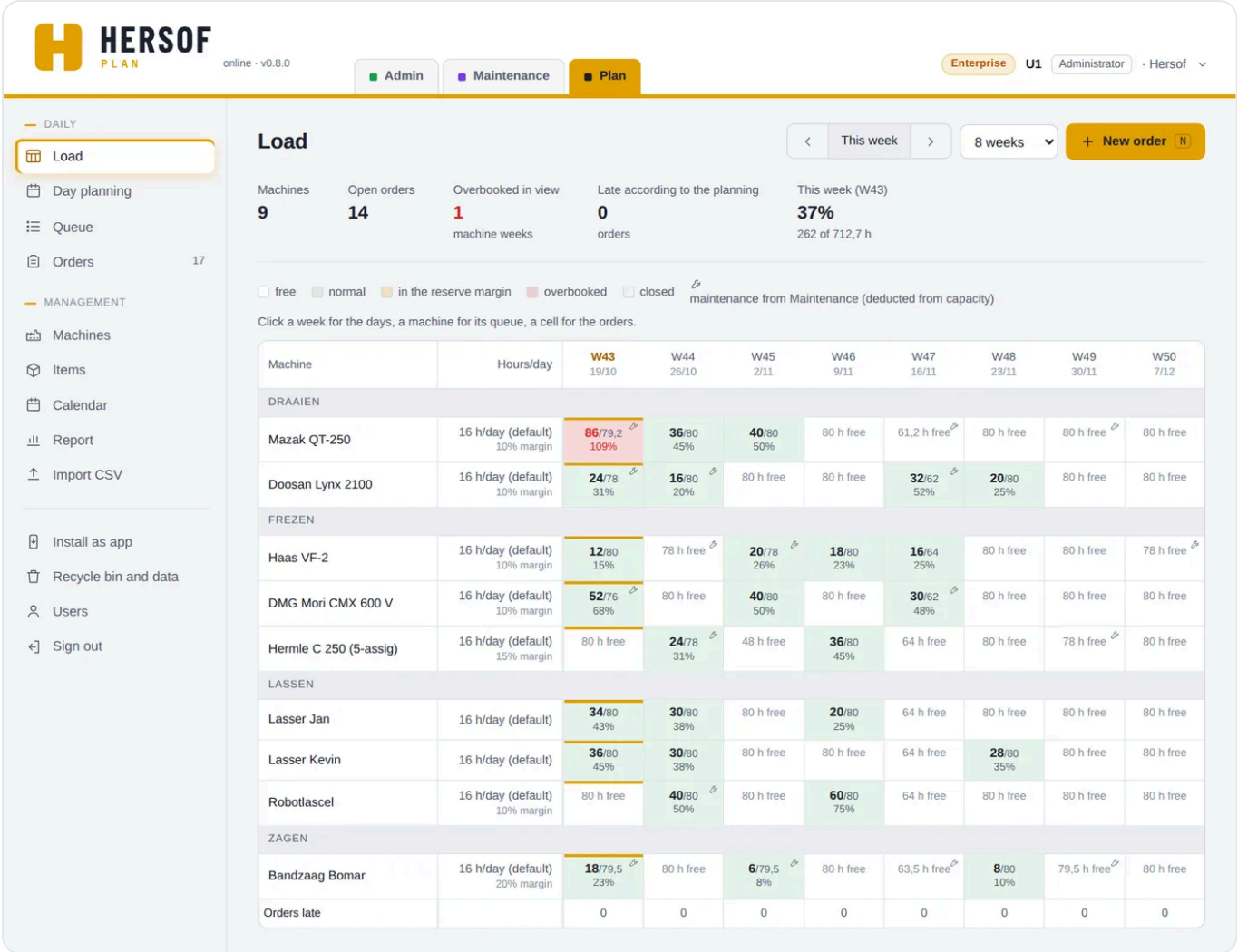
An administrator can adapt the menu on the left to the way the company works: click your name at the top right and choose **Arrange menu**. The arrangement applies to everyone in your company.

- **Groups** – tick the groups you want to use. The names come from a fixed list (e.g. *Daily, Production, Management*), so they are correct in every language. Each name can be chosen only once.
- **Moving and order** – choose an item's group; use the arrows ↑ and ↓ to put groups and items in the order you want.
- **Hide** – hide what you don't use. **Restore** in the list **Hidden items** brings it back.
- **New** – a new item after an update appears in the group *New*, at the bottom.
- **Restore default arrangement** – puts everything back the way Hersof provides it.

What someone may not use under their access level or your plan stays hidden for them or shows a padlock. Install as app, Users and Sign out always stay at the bottom. On a phone the bar at the bottom stays as it is; a hidden item does drop out of it.

Arrange my menu – every user can also arrange their own menu: click your name and choose **Arrange my menu**. It applies to you only. **Back to the company default** shows the administrator's menu again. If the administrator wants everyone to see the same menu, they untick **Users may arrange their own menu** in **Arrange menu**.

Load



The load per machine and per week

At the top: the number of machines, the open orders, how many machine-weeks are **overbooked**, and this week's load. Choose how many weeks you see (4, 8, 12 or 26), browse with the arrows or click **This week**.

Each row is a machine (grouped by category), each column a week. The cell shows *scheduled / capacity* and the percentage, or how many hours are still free.

COLOUR	MEANING
white	free – nothing scheduled
green	normal – scheduled, below the reserve margin
yellow	in the reserve margin – your rush capacity is being used

COLOUR

MEANING

red

overbooked – more scheduled than the machine can handle

hatched

closed – closed for the whole week

Mazak QT-250 · W45 (2/11)
×

Capacity	Scheduled	Still free
80 u	40 u	40 u
5 of 5 working days open	50%	normal

Order	Hours
Hydro Parts Gent NV · PO-HP-7790 Draaien · HP-F150 · Flens DN150 (25 pcs)	40 u lever 27/11/2026

📅 Days of this week
⋮ Queue
Close
+ New order in this week

Click a cell: what is in that week?

- **Click a cell:** the capacity (how many working days open, minus maintenance), what is scheduled, what is still free, the closures, the maintenance from Maintenance and the orders for that week. With **New order in this week** you can schedule something extra straight away.
- **Click a week** (at the top): that week opened up into days. **Click a machine name:** the queue of that machine (see [Day planning and queue](#)). At the bottom, the row **Orders late** shows per week how many orders with their delivery date in that week will be late according to the planning Team.
- A spanner in a cell = maintenance from Hersof Maintenance (deducted from capacity).

Day planning and queue

The weekly overview (Load) stays. Click a week to see it in **days**; click a machine to see its **queue**. Plan calculates per day: a 20 h operation on a machine with 16 h per day runs over two working days. Everything also works without dragging, with a finger on a tablet.

- **Queue** – per machine, the operations in the order in which they will be run, with the days Plan calculates and the delivery date. Change the order with the arrows ↑ ↓ (or drag by the dotted handle). The green **Done** is on the operation in progress (otherwise on the first

one). Does a machine need to be freed? Click **Move all...**: choose another machine and tick what has to go (everything by default); they go to the end of that queue.

- **Day planning** – per machine a strip per day with the operations as bars. Tap or click a bar and choose **To another day...**: choose the day (and another machine if needed) and the operation is placed on that day (pinned). Dragging with the mouse also works. An operation spanning several days is one continuous bar: each day shows its hours, the following days marked *continued* (e.g. “continued BB-2026-114 · 5.4 h”); a narrow bar shows only the purchase order. You always see 5 working days: < and > move by one day, « and » by one week, and **Today** puts today first. From the menu the day planning starts today; from Load, on the Monday of that week; **To Load** takes you back.
- **To be scheduled** – operations that only have a week (new, from Admin, Calc or an import). They count in Load. Tap them: **Schedule** (at the end of the queue) or **Schedule on a day...** **Schedule all** does that for all of them, earliest delivery date first; if that was not intended, click **Undo** in the message.
- **Order of operations** – an operation only starts when the previous one of the same order is done (plus the waiting time, if filled in).
- **Done** – the workshop manager or the planner reports an operation as done with one click. It disappears from the planning and what follows moves forward. A mistake? **Recently done** → **Not done after all**.
- **Still to do** – if an operation runs over or goes faster, enter how many hours are still needed: everything after it moves along.
- **Pin** – an operation does not start before its day (e.g. because the material only arrives then). **In progress** shows what is on the machine now.
- **Moving on and delivery date** Team – every day, what is not yet done moves on by itself, and an order that finishes after its delivery date turns **red**. Without this function each operation starts on its own day and an overloaded day shows in red.

Orders and operations



HERSOF

PLAN

online - v0.8.0

Admin

Maintenance

Plan

Enterprise

U1

Administrator

Hersof

DAILY

Load

Day planning

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Import CSV

Install as app

Recycle bin and data

Users

Sign out

Orders

Search by customer, purchase order, production order, item, machine or note

Open 14

Done 2

Cancelled 1

All 17

From Hersof Admin · still to be scheduled 3

Production order	Customer	Customer purchase order	Expected completion	Status in Admin	
P0-2026-001	Staalbouw Verhaeghe BV	BB-2026-114	31/10/2026	in production	<button>Schedule</button>
P0-2026-002	Deschacht Machinebouw BV	4500123987	11/11/2026	to schedule	<button>Schedule</button>
P0-2026-003	Hydro Parts Gent NV	P0-HP-7781	18/11/2026	to schedule	<button>Schedule</button>

Customer	Customer purchase order	Item	Operations	Scheduled	Delivery date	Status
Technics Waasland BV Assen Ø40	TW-2026-88	TW-AS-40	1 · 40 u Mazak QT-250	W43	30/10/2026	● open
Van Acker Hydrauliek NV Cilinderbehuizing Ø120	P0-VA-1040	ART-4471	3 · 64 u Bandzaag Bomar, Mazak QT-250, Haas VF-2	W42 – W43	30/10/2026	● open
Lasbedrijf Mertens BV Onderaanneming lassen	M-7712		1 · 30 u Lasser Kevin	W44	06/11/2026	● open
Staalbouw Verhaeghe BV Lasframes loods (4 pcs)	BB-2026-114	SV-FR-12	4 · 120 u Bandzaag Bomar, Lasser Jan, Lasser Kevin, Robotlascel	W43 – W44	06/11/2026	● open
Van Acker Hydrauliek NV Deksel cilinder	P0-VA-1041	ART-4472	2 · 40 u Doosan Lynx 2100	W43 – W44	06/11/2026	● open
Agro-Tech		AT-	2 · 76 u			

Orders

Search by customer, purchase order, production order, item, machine or note, and filter on **Open, Done, Cancelled** or **All**. For each order you see the operations, the scheduled weeks and the delivery date. Shown in red: *delivery date passed* or *scheduled after delivery date*. The number next to Orders in the menu counts the open orders and the production orders from Admin still to be scheduled.

Order BB-2026-114
×

Customer *

Staalbouw Verhaeghe BV

Customer purchase order

BB-2026-114

Delivery date

06/11/2026

Item

— none —

Quantity

Standard operations

Item number

SV-FR-12

Description

Lasframes loads (4 st.)

Operations

Each operation: machine, week and hours. E.g. sawing, turning, welding.

Operation	Machine	Week	Hours	Load	Done
Zagen	Bandzaag Bomar	W43 2026 · 19/10	10	18 / 79,5 u	☐ 🗑️
Lassen	Lasser Jan	W43 2026 · 19/10	34	34 / 80 u	☐ ... 🗑️
Lassen	Lasser Kevin	W43 2026 · 19/10	36	36 / 80 u	☐ ... 🗑️
Robotlassen	Robotlascel	W44 2026 · 26/10	40	40 / 80 u	☐ ... 🗑️

+ Add operation

Status

Open

Note

🗑️ Delete

Close

Save

An order with its operations

- **Customer** (required; Plan suggests customers you have used before), **Customer purchase order** (Plan warns you if the same customer already used it), **delivery date**, **item** and **quantity**, item number, description and note. If you choose an item, the Item number field disappears (the item's number comes along). For an existing order the **status** is added.
- **Operations** — for each step: what, on which machine, in which week and how many hours. The **Load** column immediately shows how full that machine is in that week. For an existing order, tick **Done** when a step is done. The **waiting time** (working days between the previous operation and this one, e.g. outsourced work) is entered via ... **More options** on the operation.
- **Status: Open, Done or Cancelled.** Only a cancelled order no longer counts towards the load; the hours of completed steps also continue to count. When you report the last operation as done in the queue or the day planning, the order is set to Done automatically.
- You can delete an order, but *Cancelled* is usually better: that way you can still find it.

How Plan suggests weeks

For operations that are not yet scheduled (see [Day planning](#)), Plan suggests the weeks with **Standard operations** (from an item) and with **Schedule** from Admin:

- each operation goes into the first week from now in which it still fits within the capacity minus the reserve margin;
- a next step never comes before the previous one;
- if it does not fit anywhere (within a year), Plan puts it in the week of the previous step, with a red warning: then split it over several weeks or choose a different machine.

You can adjust every suggestion before you save.

Machines and categories

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Admin Maintenance Plan

Enterprise U1 Administrator · Hersof

DAILY

- Load
- Day planning
- Queue
- Orders 17

MANAGEMENT

- Machines**
- Items
- Calendar
- Report
- Import CSV
- Install as app
- Recycle bin and data
- Users
- Sign out

Machines

Import from Maintenance + Category + Machine

Machines, lassers of werkposten, per categorie. Elke machine draait de uren per dag hieronder, tenzij je bij de machine iets anders invult; de reservemarge houdt je vrij voor spoed en onvoorziene zaken.

Hours per day Save

How many hours each machine can run per weekday (e.g. 16 h for two shifts). A machine can differ; enter that on the machine. A day with 0 h is not scheduled.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
16	16	16	16	16	0	0

Draaien 2

Machine	Hours per day	Reserve margin	Scheduled from now on	Status
Mazak QT-250 Maintenance	16 h/day (default)	10%	4 operations	active
Doosan Lynx 2100 Maintenance	16 h/day (default)	10%	4 operations	active

Frezen 3

Machine	Hours per day	Reserve margin	Scheduled from now on	Status
Haas VF-2 Maintenance	16 h/day (default)	10%	4 operations	active
DMG Mori CMX 600 V Maintenance	16 h/day (default)	10%	3 operations	active
Hermle C 250 (5-assig) Maintenance	16 h/day (default)	15%	2 operations	active

Lassen 3

Machine	Hours per day	Reserve margin	Scheduled from now on	Status
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Machines per category

Only the administrator can change machines.

Mazak QT-250

Name *
Mazak QT-250

Category
Draaien

Hours per day (only if this machine differs)
default (16 h)

Reserve margin (%)
10

Empty = the hours per day under Machines (for all machines). E.g. 8 for a machine with one shift.

Kept free for rush jobs. Above this limit the cell turns yellow.

Note

Same machine in Hersof Maintenance
Mazak QT-250 draaibank (M-001)

Scheduled maintenance, inspections and work orders for that machine are then deducted from the capacity in the schedule.

☒ Active (shown in the schedule and can be scheduled)

Delete

Close

Save

A machine

- **Name, category, hours per day** (only if the machine differs from the hours per day for all machines), **reserve margin (%)** and a note.
- **Same machine in Hersof Maintenance** – link them, and the scheduled maintenance is deducted from the capacity.
- **Active** – if you untick it, the machine disappears from the grid, but the schedule is kept. You cannot delete a machine that has operations; set it to inactive.
- You can rename and delete categories and move them up or down; you can also move machines with the arrows. A deleted category comes back with **Undo** in the message.

How Plan calculates: capacity of a week = hours per week × open working days / 5, minus the maintenance from Maintenance. Weekends never count; a closing day removes a whole day.

Calendar

HERSOF PLAN online - v0.8.0

Admin Maintenance Plan

Enterprise U1 Administrator · Hersof

Calendar

Holidays, public holidays and maintenance. A closure for the whole company applies to all machines; you can also close a single machine. Closed working days reduce the capacity in that week.

Add closure

For: Whole company (dropdown)
From: dd/mm/yyyy (calendar icon)
Up to and including: dd/mm/yyyy (calendar icon)
Reason: e.g. Summer shutdown, Maintenance (text input)

+ Add Belgian public holidays 2026 Belgian public holidays 2027

Upcoming closures

Period	For	Reason	Working days	
04/11/2026 – 05/11/2026	Hermle C 250 (5-assig)	Kalibratie Hermle	2	🗑
20/11/2026	Whole company	Opleidingsdag (heel bedrijf)	1	🗑
24/12/2026 – 02/01/2027	Whole company	Kerstverlof	7	🗑

Calendar with closures

Add closure: for the whole company or for a single machine, from-to inclusive, and a reason (e.g. summer shutdown, maintenance). A closure applies to whole days, for up to a year. If operations that are already scheduled fall in a closure for a single machine, Plan immediately offers **Move...** in the message (to another machine). With **Belgian public holidays** you add, in one go, the ten public holidays that fall on a weekday. You cannot edit a closure: delete it (that happens straight away, with **Undo**) and add it again. With **Also show past** you also see old closures.

Items

online - v0.8.0

Admin

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Items

+ New item

Define the standard operations for each item: machine, set-up time and hours per piece. For a new order you choose the item and the quantity, and Plan fills in the operations, each in the first week where they fit. Link an item to a product from Hersof Admin (or give it the same number as the product code), and production orders from Admin are filled in straight away.

Q Search by item number or name

Item	Standard operations	Set-up time	Hours per piece	Status
AS-100 As Ø40 x 100 mm	1 · Doosan Lynx 2100	1 u	0,25 u (15 min)	active
P906 Flens S235 DN100	3 · Bandzaag Bomar → Mazak QT-250 → Haas VF-2	2,8 u	0,6 u (36 min)	active
P908 Admin Lasframe S355 volgens plan	3 · Bandzaag Bomar → Lasser Jan → Haas VF-2	3 u	3,75 u	active

Items

An item is a part you make often, with its **standard operations** in order: for each step the machine, the **set-up time** (hours) and the **hours per piece** (0.25 = 15 minutes).

Item AS-100

Item number *

AS-100

Name

As Ø40 x 100 mm

Product in Hersof Admin

— not linked —

A production order from Admin with this product then gets these operations straight away. Without a link, Plan searches on item number = product code.

Standard operations

In sequence. Hours for an order = set-up time + quantity × hours per piece.

Operation	Machine	Set-up time (h)	Hours per piece	For
Draaien	Doosan Lynx 2100	1	0,25	10 pcs

+ Add operation

Hours per piece can be small: 0,25 = 15 minutes per piece. The last column shows a sample calculation.

Note

Testartikel (028b), zonder Admin

☒ Active (can be chosen for an order)

Delete

Close

Save

An item with standard operations

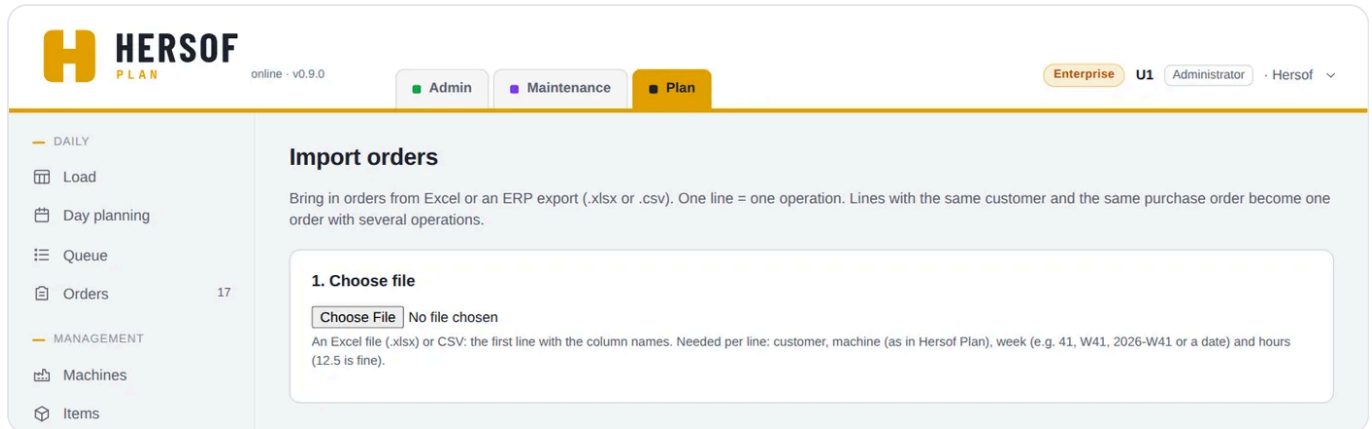
In an order you choose the item and the quantity: Plan fills in the steps itself straight away with *set-up time + quantity × hours per piece* and suggests the weeks. With **Standard operations** you

Report **Team**

Capacity report

Manual Hersof Plan · hersof.be

Importing Team



Importing orders from Excel or your ERP

Bring in orders from Excel or your ERP system: one line = one operation. Lines with the same customer and the same purchase order become one order with several operations.

1. **Choose file:** your Excel file (**.xlsx**, the first sheet) or a CSV (semicolon, comma or tab).
2. **Map columns:** customer, customer purchase order, item number, description, operation, **machine** (exactly the same name as in Plan), **week or date** (e.g. 41, W41, 2026-W41 or a date) and **hours**, optionally the delivery date.
3. **Check and import:** you see the new orders, the lines with an error (and why), and what already exists (this is skipped).

Together with Hersof Admin Team

Do you work with production orders in Hersof Admin (from Team, in both Admin and Plan)? Then at the top of the **Orders** screen there is the list **From Hersof Admin · still to be scheduled**, the earliest expected at the top. Click **Schedule**: Plan creates an order with the customer, the customer purchase order and the expected date as delivery date; the production order number is shown separately (e.g. *Admin PO-2026-001*). If the product in Admin is linked to an item in Plan (or the product code is the same as the item number), the standard operations with suggested weeks come along too. With **Save and schedule** they go straight into the queue.

The status goes back to Admin automatically: when an operation is finished, the production order becomes *in production*; when the order is finished, it becomes *ready*. If the production order is cancelled or set to ready in Admin while the order in Plan is still open, Plan shows a red message with the button **Set to Done here too** or **Cancel here too**.

Together with Hersof Maintenance Team

Link a Plan machine to the same machine in Hersof Maintenance (in the machine's window, or all at once with **Import from Maintenance**). The scheduled maintenance, inspections and work orders for that machine are then deducted from the capacity in Plan, including running-hours maintenance (with an estimated date). Anything overdue counts once in the current week.

You set how many hours are deducted in Maintenance, under **Estimated duration (hours)** of the action or work order. Empty = the average of previous times. If it says *duration unknown*, enter an estimated duration in Maintenance.

Recycle bin and your data

Deleted something by mistake? Don't panic: it stays in the **recycle bin** for 30 days. Only the administrator sees the recycle bin, in **Recycle bin and data** (bottom left in the menu).

- **Restore** — one click brings it back, exactly as it was (number, date ...), together with whatever was removed with it (e.g. the operations of an order). Whatever exists again is never overwritten; if something fails, you see why.
- For each deletion you see when, by whom and until when it stays in the recycle bin. After 30 days it is gone for good, photos and attachments included.
- **Download my data** — one zip file with all your data from this app (opens in Excel) and the photos, attachments and documents. That way you always have your own copy. Keep it in a safe place. If your last download is more than 3 months ago, the administrator gets a reminder.

Language, appearance and installing

- Click your name at the top right: **appearance** (light, dark or same as your device), **language** (Nederlands, Français, English, Deutsch), **Info for support** and **Sign out**. These choices apply in all Hersof apps.
- **Install as app** (menu on the left) — its own window and icon. In Edge or Chrome with one click; on an iPhone via the Share button → *Add to Home Screen*. Handy for a large screen in the workshop with a viewer login.

Plans and trial period

Starter includes the grid, orders, machines, items and the calendar. From Team, the report, importing from a CSV file and the integration with Hersof Admin and Hersof Maintenance are added. The plan also determines how many administrators + planners you can invite: Starter 3, Team 10, Pro 25, Enterprise 50; viewers are unlimited and free. The integration with Admin's production orders requires Team, in both Admin and Plan. Prices are on [the Hersof Plan page](#).

Trial period — for the first 30 days you work with all the Pro features. From 7 days before the end, the administrator sees a message at the top.

Need help?

Email herwig@hersof.be. Something going wrong? Click your name → **Info for support**, copy what it shows and paste it into your email. Errors in the app are also reported to Hersof automatically.