

Flow Products — Setup & Administration Guide

CollectFlow · RouteFlow · StockFlow · FieldFlow · RentalFlow · InboxFlow

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About this guide

This guide is for the **administrator** who sets up a Flow product for their company. It covers what every Flow product has in common:

- getting your account and registering your company,
- signing in and managing passwords,
- the standard **Setup** area, and
- a first-run checklist for each product.

Day-to-day use of each product is covered in its own **User Guide**.

Every Flow product connects to **SAP Business One** through the SAP **Service Layer** and shares the same Setup layout. Once you have set up one Flow product, the others will feel familiar.

Product	What it does	Roles
CollectFlow	Accounts-receivable collections: worklist, dunning, promises to pay, disputes, customer portal	Admin, Manager, Collector
RouteFlow	Delivery planning, dock loading, driver proof of delivery, returns	Admin, Dispatcher, Viewer, Loader
StockFlow	Warehouse management on handhelds: receive, put away, pick, pack, count	Admin, Supervisor, Operator
FieldFlow	Field service: dispatch board, technician phone app, invoicing	Admin, Dispatcher, Technician, Viewer
RentalFlow	Equipment rental (early release: platform and locations only)	Admin, Manager, Viewer
InboxFlow	Emailed vendor and customer documents into SAP (early release)	Admin, Reviewer, Viewer

1. Before you start

Have the following ready:

1. **Your welcome details from CSC-WORK.** These are an *Install ID*, an *API key* and a registration link. CSC-WORK sends them when your subscription is created.
2. **SAP Business One Service Layer access:**
 - the Service Layer URL, for example `https://sap.yourcompany.com:50000/b1s/v1`,
 - the company database name, for example `SBODEMOUS`,
 - an SAP user and password that the Flow product will use.Use a dedicated SAP user (for example `FLOW_SVC`) so that postings are easy to trace in SAP.
3. **Network access.** The Flow product must be able to reach the Service Layer over HTTPS. If SAP is behind your firewall, ask CSC-WORK about the secure connection options.
4. **An email account for outgoing mail** (optional, but recommended). This needs an SMTP host, port, username and password, so that customer emails go out under your own address.
5. **Your company logo.** PNG, JPEG, GIF, WebP or SVG, up to 512 KB.

Tip: You can do every step in this guide before connecting SAP. Until a company is connected, each product shows **demo data** (clearly labelled) so you can try it safely.

2. Registering your company

CSC-WORK creates your subscription in its Command Center. You then receive a registration link that looks like this:

```
https://<product>.csc-work.com/register?install_id=<your install id>
```

CF CollectFlow

by CSC WORK CSC-WORK

Set up your CollectFlow

Enter the credentials your account rep sent you, then choose a company name and the email for your first admin user.

INSTALL ID

e.g. 3f9c8b16-...

API KEY

Paste the API key from your account rep

COMPANY NAME

e.g. Abaline

ADMIN FULL NAME

ADMIN EMAIL

admin@your-company.com

→ Create my company

Need help? support.csc-work.com · © CSC-WORK

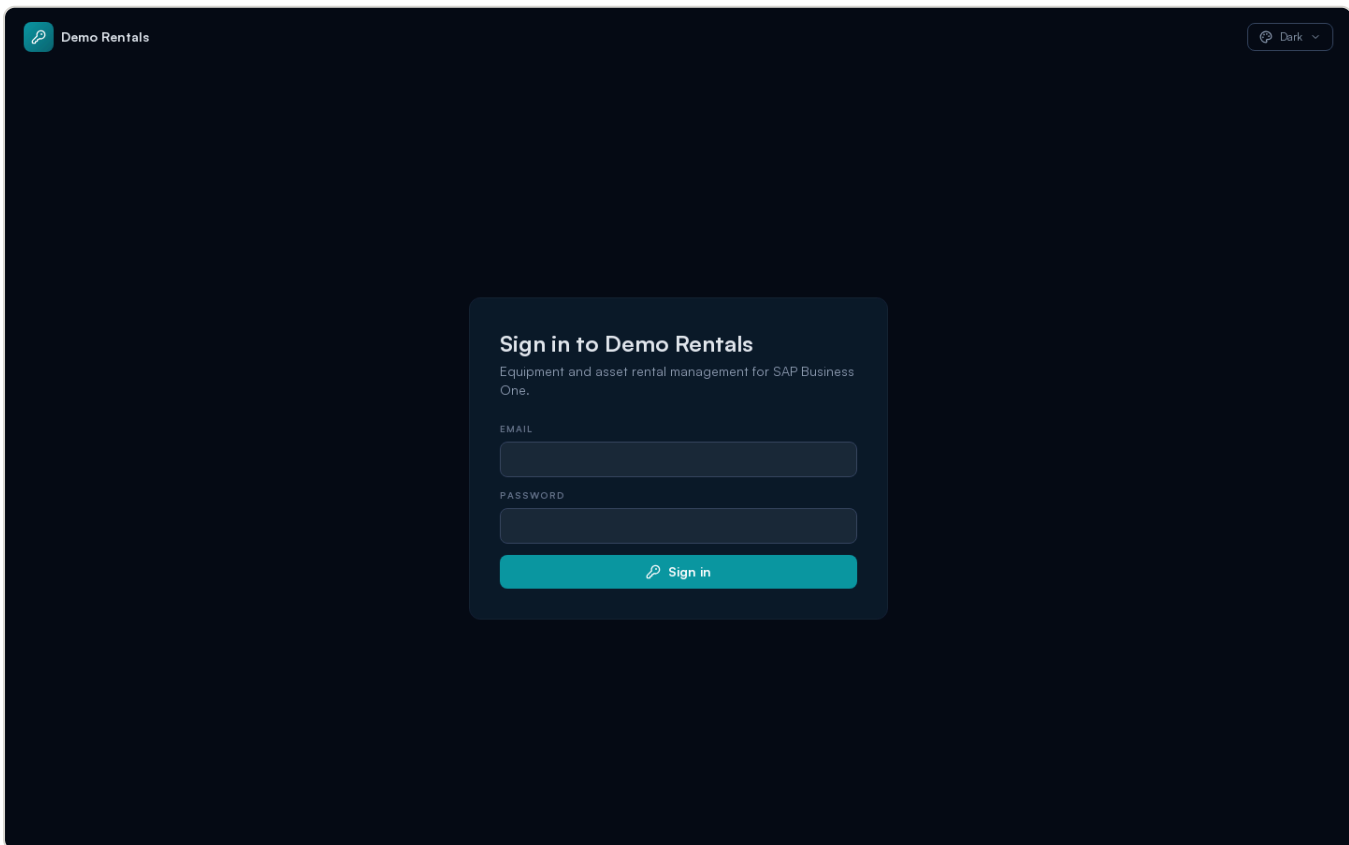
THE REGISTRATION PAGE (“SET UP YOUR COLLECTFLOW”). EVERY FLOW PRODUCT USES THE SAME FORM.

To register:

1. Open the registration link. The **Install ID** is filled in for you.
2. Paste the **API key** from your welcome details.
3. Enter your **Company name**. It becomes your company's web address (for example *Acme Supply* → `acme-supply`).
4. Enter the **Admin full name** and **Admin email** of the first administrator. That is normally you. StockFlow also asks for an **Admin username**, because handheld users sign in with a username.
5. Click **Create my company**.
6. The **Registered** page shows your admin email and a **temporary password**. It is shown **once only**, so copy it now.
7. Click **Sign in to your company**.

A new company starts on a **demo licence**. You can explore and configure everything; live posting to SAP is switched off until your paid plan is active. See [Billing](#).

3. Signing in



A TYPICAL SIGN-IN PAGE.

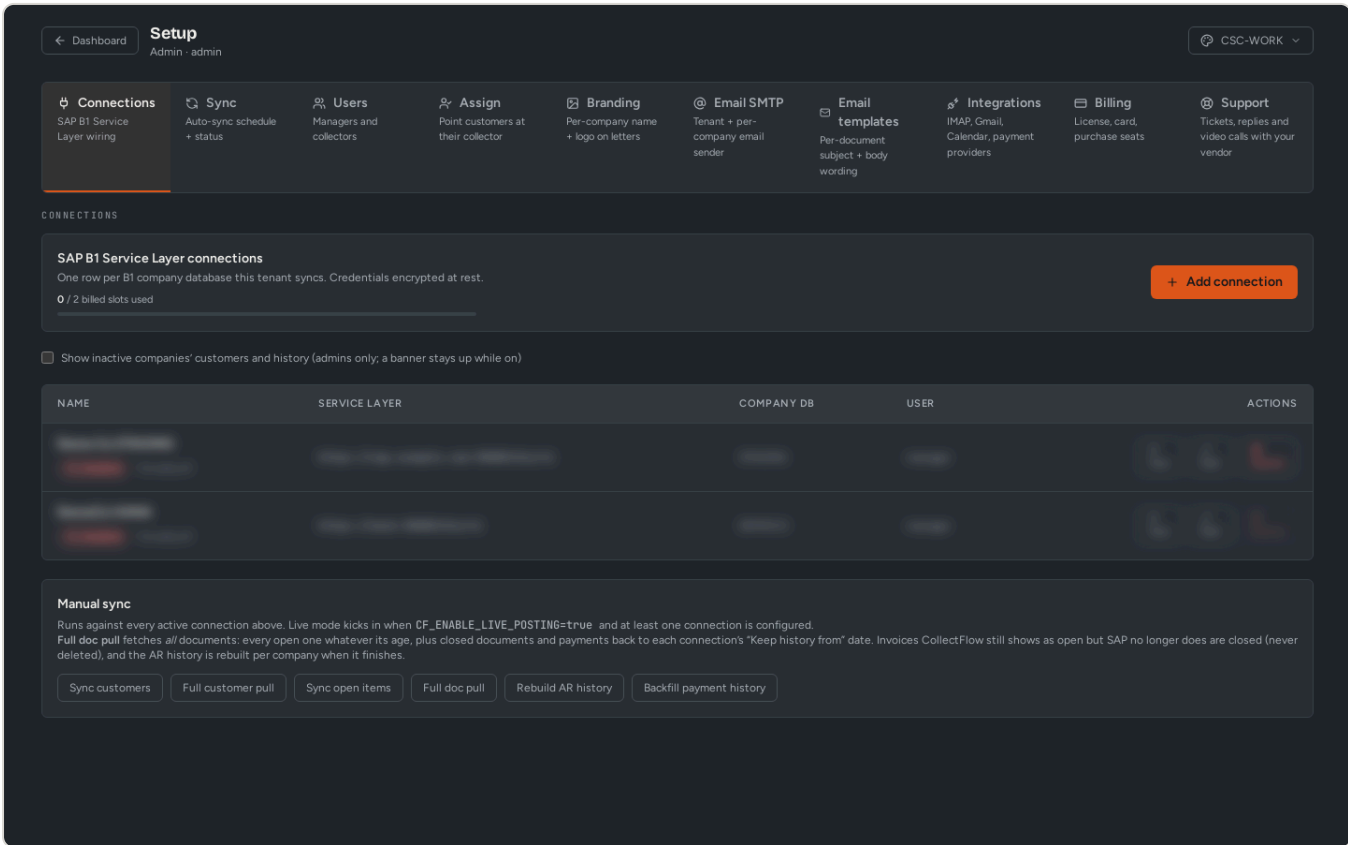
- Go to your company's address and enter your **Email** and **Password**. StockFlow handhelds use a **Username** instead.
- The **first time** you sign in with a temporary password, you are asked to **Set your password**. Enter the temporary password, then a new password of at least 8 characters, twice.
- **Single sign-on**. CollectFlow and InboxFlow can sign you in with Microsoft Entra, Google or Keycloak if your company has asked for it. If only one sign-in provider is set up, you go straight to it. Add `?local` to the sign-in address to use a password instead.
- **Sessions** last up to 8 hours. Each signed-in person uses one **seat**. Seats count people signed in at the same time, not named users.
- **Forgotten password?**
 - An **administrator** can issue a new temporary password in **Setup → Users**.
 - If the administrator is locked out, open a ticket at **support.csc-work.com**. CSC-WORK can send a reset email.
- **Support access**. If CSC-WORK support signs in on your behalf to help you, a banner at the top of every page says so.

4. The Setup area

Click **Setup** in the top bar. Setup is a row of tabs. Each tab shows a one-line description, and you only see the tabs your role is allowed to use. The tabs below are **the same in every Flow product**. Product-specific tabs are listed in [section 5](#).

Connections

SAP B1 Service Layer wiring. Administrators only.



CONNECTIONS TAB (COLLECTFLOW).

Click **Add connection** and fill in:

Field	What to enter
Display name	A friendly name, for example <i>Acme US</i> . Users see this name.
Company DB	The SAP company database name, for example <code>SBODEMOUS</code> .
Service Layer URL	For example <code>https://sap.acme.com:50000/b1s/v1</code> .
SL username / SL password	The SAP user Flow signs in as. When you edit a connection later, leave the password blank to keep the current one.

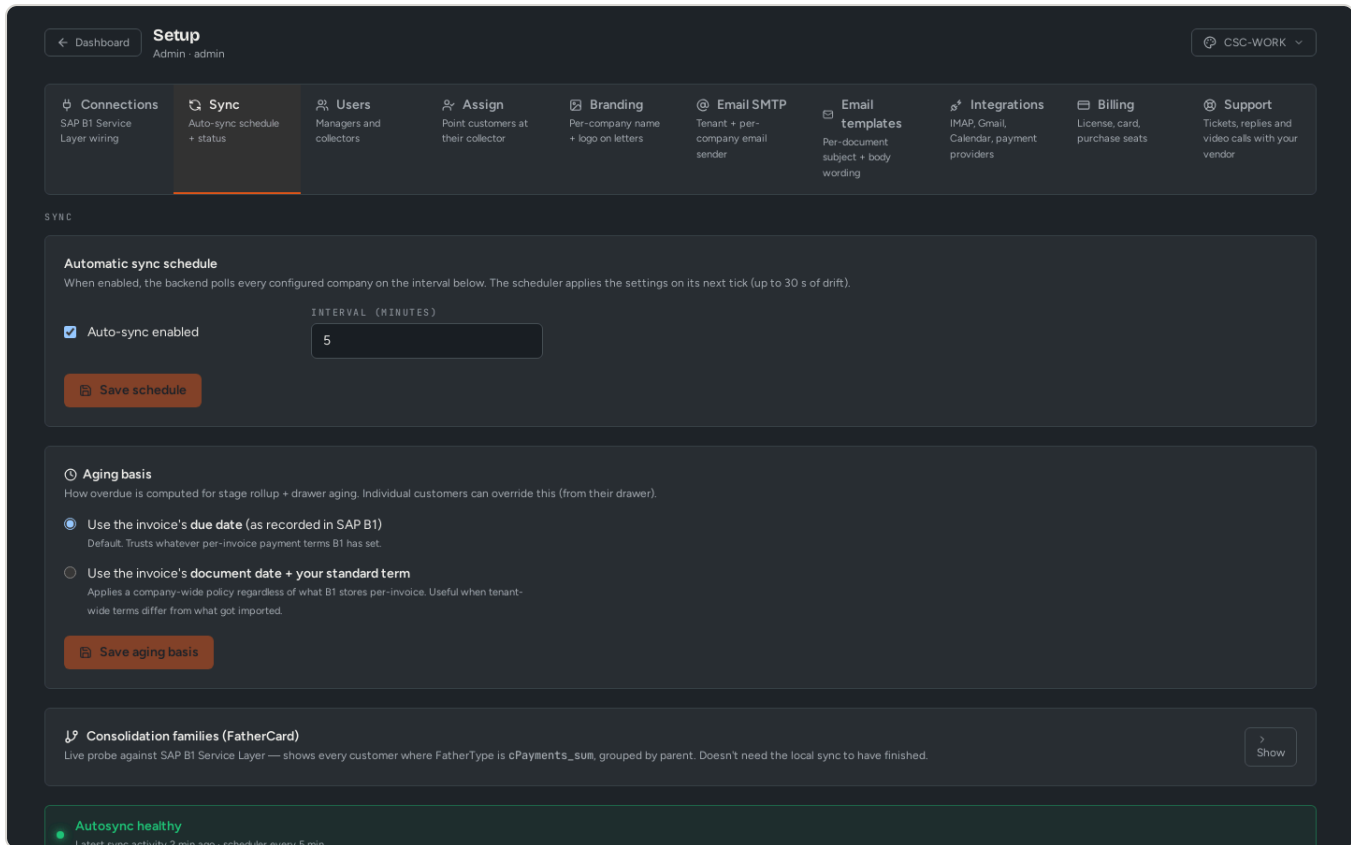
Field	What to enter
DB platform	HANA or SQL Server . Shown in RouteFlow, StockFlow, FieldFlow and RentalFlow.
Effective from / Expires	Optional. Use these to schedule a switch-over, for example from a test company to the live company on go-live day.
Verify TLS certificate	Leave it on . Turn it off only for a test server with a self-signed certificate.
Active	Untick to switch a connection off without deleting it.

Click **Save connection**, then click **Test**. The test signs in to the Service Layer and reports success or the exact SAP error.

- **Number of companies.** How many SAP companies you can connect depends on the *B1 companies* count on your plan. The bar at the top shows “*N / M slots used*”. To add more, go to **Billing**.
- **CollectFlow only:** set **Keep history from** to choose how far back invoices are pulled (default: the last 24 months). When you reactivate a connection that still has data, you are asked whether to **Append** to that history or **Start fresh**.
- **RouteFlow only:** set the **GL expense account** and **GL accrual account** used for mileage journal entries.
- **FieldFlow only:** after **Test**, click **Verify UDFs**. This checks that the user-defined field `U_FF_JobRef` exists. FieldFlow will not post until it does, because the field is what stops duplicate postings.

Sync

Bringing master data in from SAP. Administrators only.



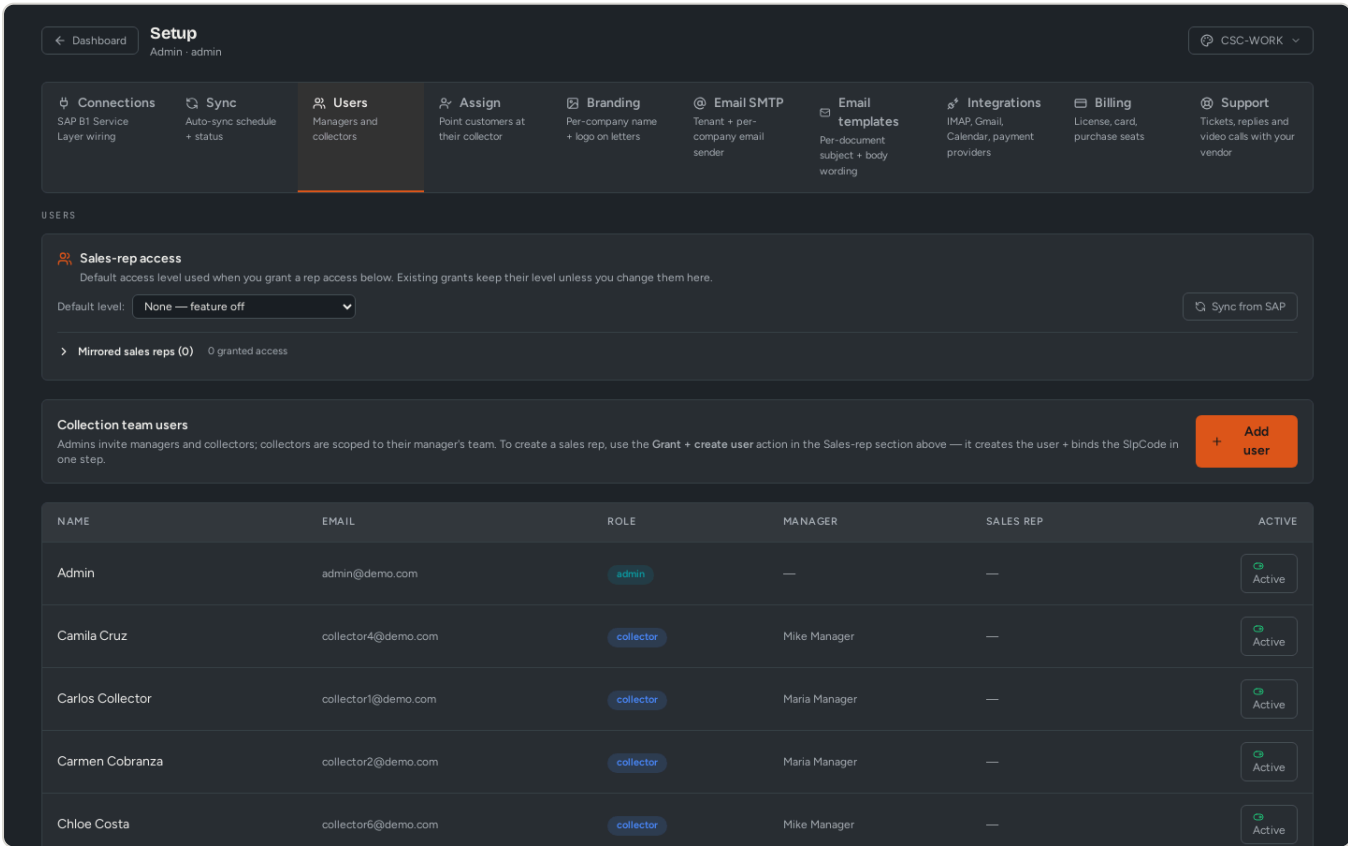
SYNC TAB (COLLECTFLOW) .

What is synchronised depends on the product:

Product	What Sync brings in	How
CollectFlow	Customers, open invoices, credit memos, payments	Automatic, every <i>N</i> minutes (Auto-sync enabled, Interval (minutes), Save schedule). Also sets the Aging basis : due date, or document date plus a standard term.
RouteFlow	SAP warehouses → Depots , employees → Drivers , fixed assets → Trucks	Pick the rows and import them. Licence and compliance details you enter in RouteFlow are never overwritten.
StockFlow	Status of SAP data, of postings, and of the handheld offline queue	Read-only status, plus Retry now / Discard for queued handheld work.
FieldFlow	Items, warehouses, employees and other master data	Refresh from B1.
RentalFlow	SAP warehouses → rental Locations	Tick the rows, then Import N as locations.
InboxFlow	Business partners and their contacts	Automatic schedule, plus Sync now and Full pull.

Users

Who can sign in. Administrators only (supervisors too in StockFlow).



USERS TAB (COLLECTFLOW).

- 1. Click **Add user** (called **Create user** in some products).
- 2. Enter **Full name**, **Email** and **Role**.
- 3. Leave **Password** blank to have a temporary password generated. It is shown **once**, so copy it and give it to the person. They must change it the first time they sign in.
- 4. To stop someone signing in, untick **Active** or click **Deactivate**. Their history is kept.

Some products have extra fields:

Product	Extra user options
CollectFlow	Manager (who a collector reports to); Sales-rep access , which links SAP sales employees to users with an access level of <i>None</i> , <i>View only</i> , <i>Light</i> or <i>Full</i> .
RouteFlow	Handheld PIN (4–8 digits) and Badge code for loaders; Returns approver flag; Handheld devices list (PIN and badge sign-in only work on a registered device); Unlock PIN after 5 wrong tries.
StockFlow	Username for the handheld; Zones (blank = all); equipment and certifications; Badge ; per-person work settings.

Product	Extra user options
FieldFlow	Consumes a seat. Technicians use <i>field</i> seats; everyone else uses <i>office</i> seats.

Branding

Your logo and company name on emails and documents. Administrators only.

The screenshot shows the 'Branding' tab in the 'Setup' menu. The 'Branding' tab is highlighted. Below the menu, there are two sections for 'Demo Co STAGING' and 'DemoCo HANA'. Each section has a 'Company name on letters & signature' field, a 'Signature preview' section, and a 'Company logo' section with an 'Upload logo' button.

BRANDING TAB (COLLECTFLOW).

Click **Upload logo** (PNG, JPEG, GIF, WebP or SVG, maximum 512 KB). Use **Replace logo** or **Remove** to change it later.

In CollectFlow, InboxFlow and RouteFlow you can set a name and logo **per SAP company**. RouteFlow also sets the sender name, sender address and reply-to address per company. Customers then see the right company on every letter.

Email SMTP

The mail server your emails go through. Administrators only.

The screenshot shows the 'Setup' tab in the 'Email SMTP' section of the CSC-WORK interface. The interface is dark-themed. At the top, there's a navigation bar with 'Dashboard' and 'Setup' (Admin - admin). Below this is a horizontal menu with various options: Connections, Sync, Users, Assign, Branding, Email SMTP (selected), Email templates, Integrations, Billing, and Support. The 'Email SMTP' section is active, showing a 'Tenant SMTP (default + staff emails)' section with a description. Below this are fields for SMTP host, port, username, password, from address, from name, and signature. A 'Save' button is at the bottom right.

EMAIL SMTP TAB (COLLECTFLOW).

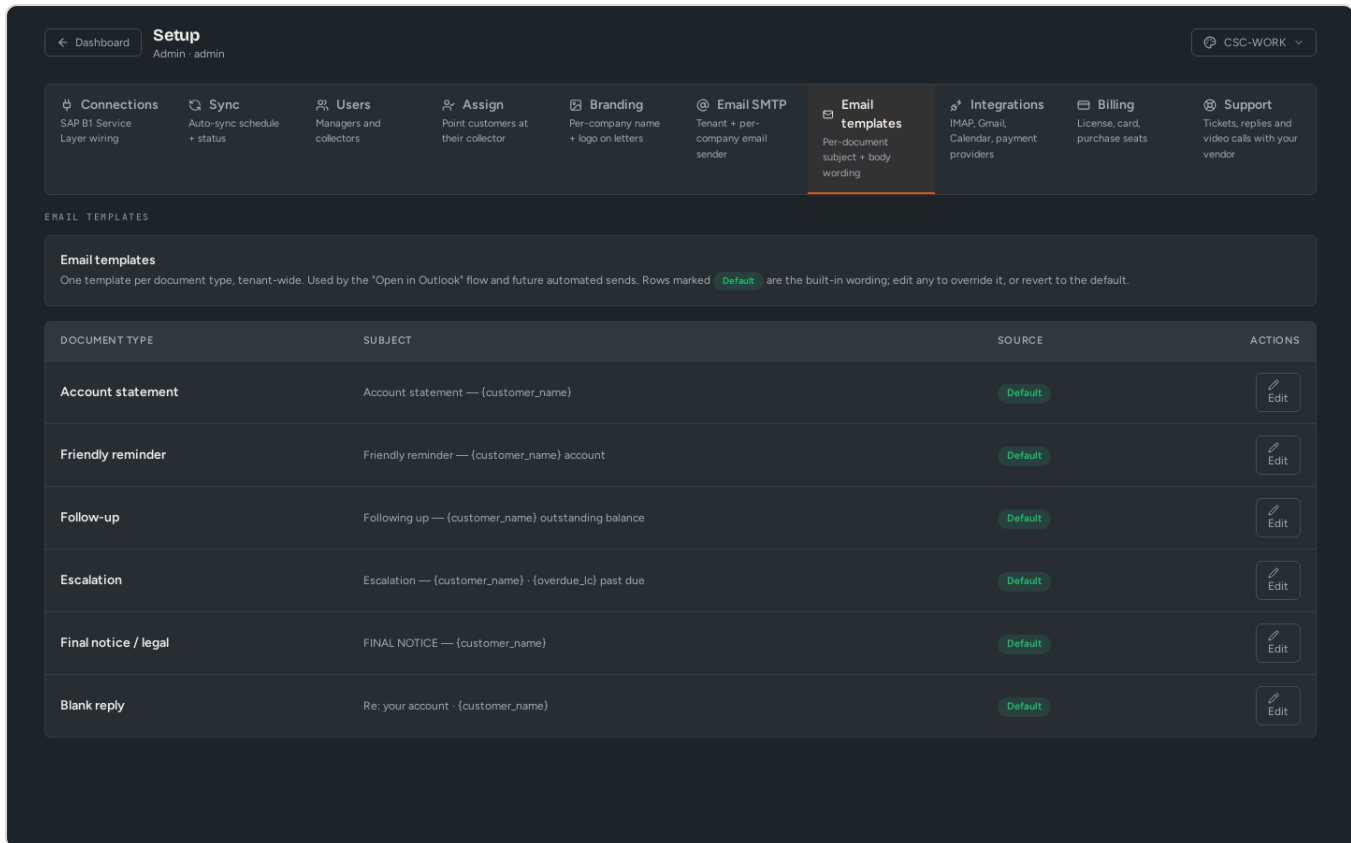
Field	Typical value
SMTP host	smtp.office365.com , smtp.gmail.com , or your own server
Port	587 with STARTTLS (most common), 465 with SSL, or 25 with no encryption
Username / Password	The mailbox account. For Microsoft 365 or Google, this is often an <i>app password</i> .
From address / From name	What customers see, for example accounts@acme.com / Acme Accounts
Signature (HTML)	Added to system emails

Click **Save**, then use **Send test email** to send yourself a test message. If you leave SMTP empty, mail goes out through CSC-WORK's default server.

- **RouteFlow only:** a **Demo mode** switch sends all customer emails to a list of test recipients instead of to real customers. Use it while you are testing.
- **CollectFlow only:** each SAP company can have its own SMTP (**Set up company SMTP**).

Email templates

The wording of every email. Administrators, plus managers, dispatchers, supervisors or reviewers depending on the product.



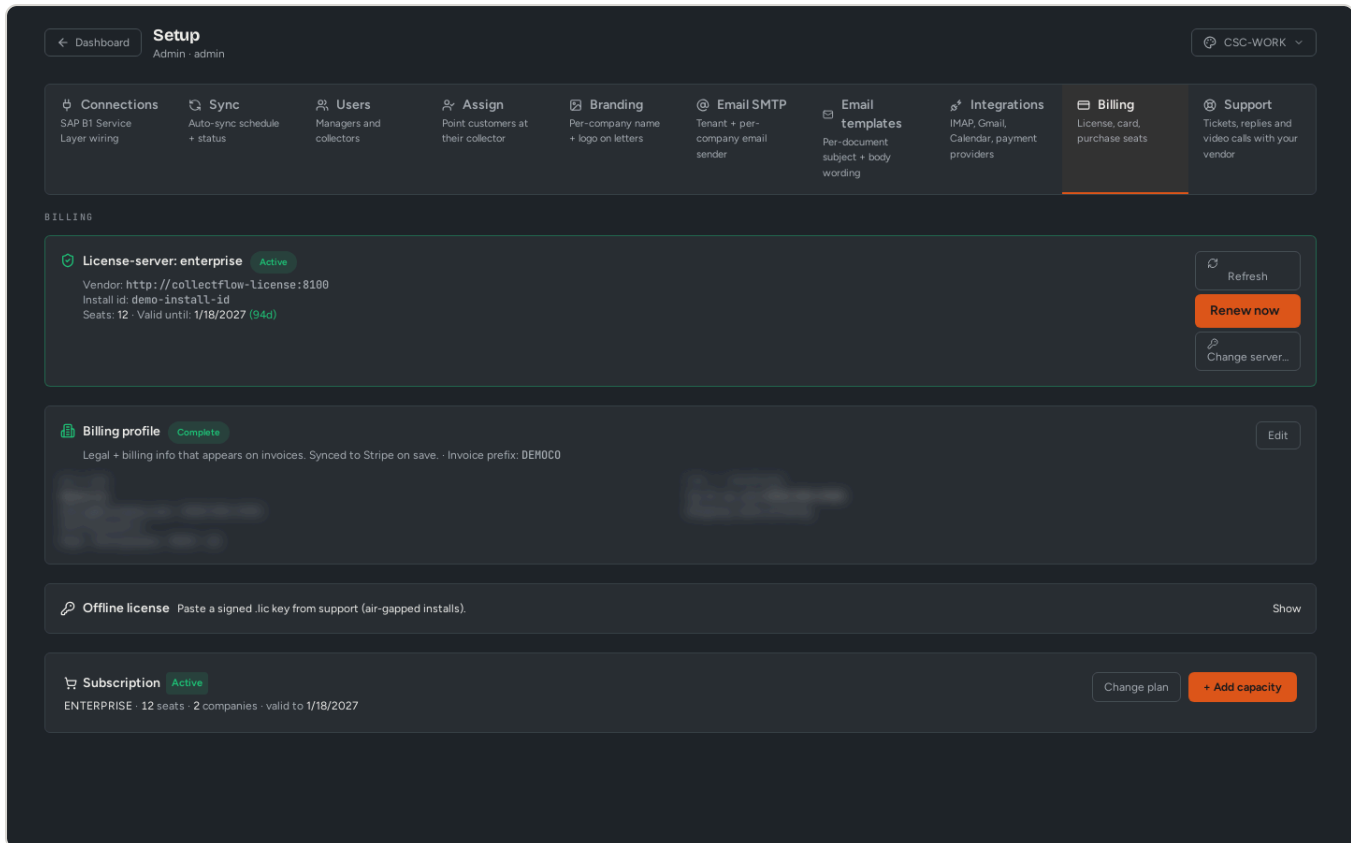
EMAIL TEMPLATES TAB (COLLECTFLOW).

Each email type has a built-in **Default** wording that you can change:

1. Click a template to open it.
2. Edit the **Subject** and the **Body (HTML)**. Click a **token** (for example `{customer_name}` or `{invoice_number}`) to insert it.
3. Click **Preview with sample data** to see the result, or **Send test** to email it to yourself.
4. Click **Save**. **Revert to default** restores the built-in wording.

Billing

Licence, plan, seats and payment. Administrators only.



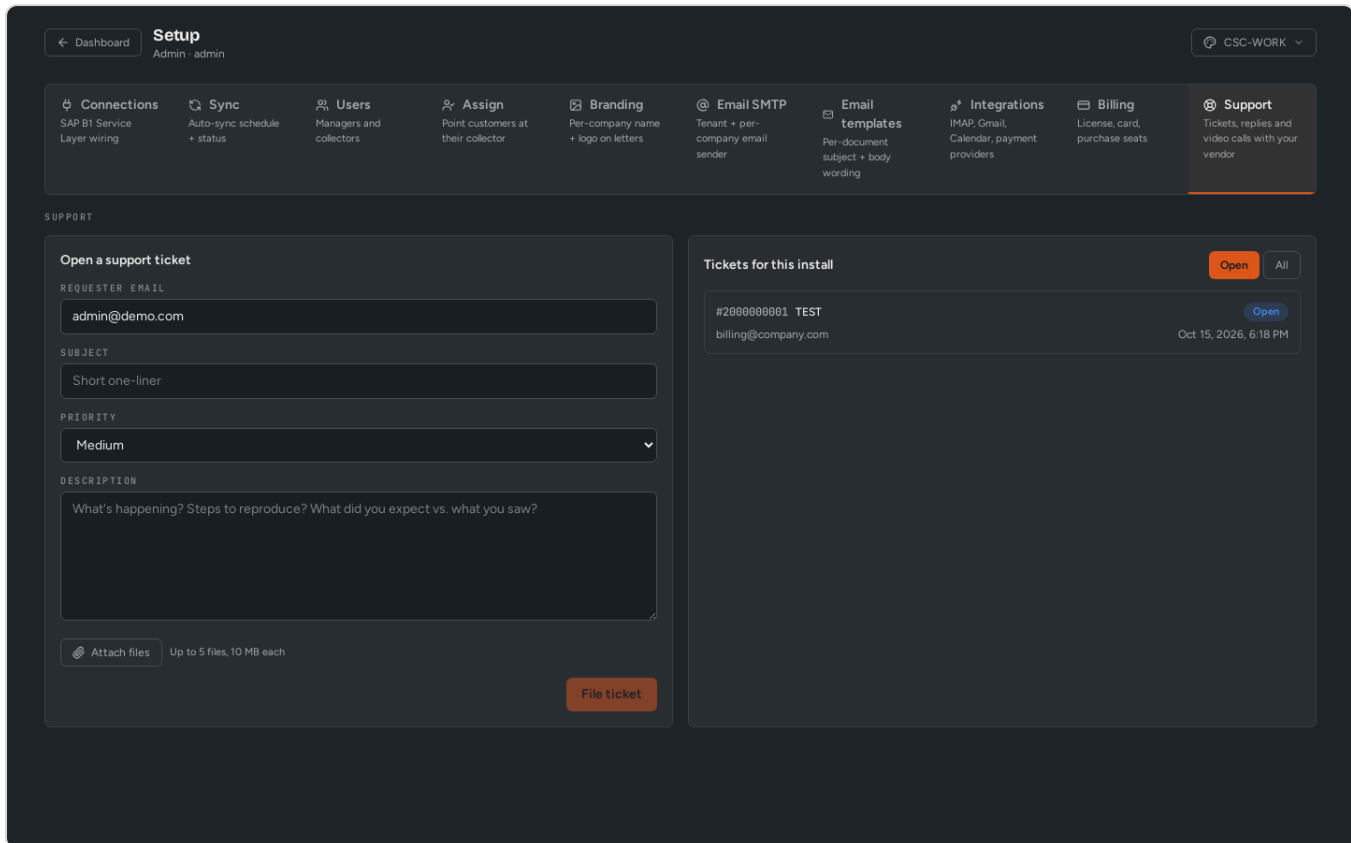
BILLING TAB (COLLECTFLOW).

- **Licence panel:** shows your plan (tier), seats, SAP companies and expiry date. Use **Refresh** to fetch the latest licence, or **Renew now**.
- **Billing profile:** legal name, billing email, address and tax ID. These appear on your invoices.
- **Subscribe:** choose a **Service level** (Starter / Mid-Market / Enterprise), the number of **Seats** and **B1 companies**, monthly or yearly billing, and enter a card.
- **Change service level** or **add seats** at any time. Changes are prorated.
- **Offline licence:** if your server cannot reach the internet, paste the licence file CSC-WORK sends you and click **Verify & apply** (StockFlow: **Install licence**).

FieldFlow shows the licence read-only; seats and renewals are arranged through **Support**. InboxFlow subscriptions are arranged through **Support** while per-flow pricing is introduced.

Support

Tickets, replies and video calls with CSC-WORK. Every role.



SUPPORT TAB (COLLECTFLOW).

1. Click **New ticket** (or fill in *Open a support ticket*).
2. Describe what happened, choose a **Priority** (Low, Medium, High or Urgent) and attach screenshots if you have them.
3. Click **File ticket**.
4. Replies appear in the ticket thread. Reply there, or click **Join call** for a video call with screen sharing.
5. **Close ticket** when the problem is solved. Replying to a closed ticket reopens it.

Administrators see every ticket for the company; other users see their own. You can also reach support at **support.csc-work.com**.

5. Product-specific Setup tabs

Each product adds a few tabs of its own next to the standard ones.

Product	Extra tabs
CollectFlow	Assign: point each customer at a collector. Integrations: IMAP inbox, Gmail, Google Calendar and payment providers (PayPal, Braintree, Square, Authorize.Net, Stripe).
RouteFlow	SAP Setup: when Deliveries and Returns post, the GL map, cash-receipt rules, scan-verified loading, warehouse board, scan-to-deliver and hazmat rules. Payment providers: Stripe and PayPal for card charges. System: licence and tier, on-time tolerance, driver sign-in and navigation app.
StockFlow	My setup: per handset camera, voice, sound and text size. Site: per warehouse, how work arrives and when scans post.
FieldFlow	Vans: truck warehouses and minimum stock. Technicians: SAP employees, rates and who drives which van. Equipment: metered assets and service intervals. Job templates: checklists and parts. Invoicing: labour, fixed-price and expense items, and price list. Integrations: payment gateway.
InboxFlow	Mailboxes: IMAP and Google Workspace mailboxes to read.

Each product's User Guide explains these tabs.

6. First-run checklists

Work through the list for your product, from top to bottom.

CollectFlow

1. Connections → add, **Test**.
2. Sync → turn on auto-sync, choose the aging basis.
3. Users → add managers and collectors; set up sales-rep access.
4. Assign → give every customer a collector.
5. Branding, Email SMTP, Email templates.
6. Billing → subscribe.

RouteFlow

1. Connections → add, **Test**, set the GL accounts.
2. Sync → import depots, drivers and trucks.
3. SAP Setup → posting policy, cash rules, loading flow, hazmat.
4. Users → dispatchers, loaders (PIN or badge); register the dock handhelds.
5. Fleet → pair each driver's phone.
6. Branding, Email SMTP (start in demo mode), Email templates.
7. Billing.

StockFlow

1. Connections → add, **Test**.
2. Site → per warehouse, how work arrives and when scans post.
3. Users → operators (username, zones, badge) and supervisors.
4. On each handheld: sign in once, then **My setup**.
5. Branding, Email SMTP, Email templates.
6. Billing → register the install and subscribe.

FieldFlow

1. Connections → add, **Test**, **Verify UDFs**.
2. Sync → **Refresh from B1**.
3. Vans → add vans and minimum stock.
4. Technicians → add technicians, then **Who drives what**.
5. Job templates, Invoicing.
6. Users, Branding, Email SMTP, Email templates, Integrations (payments).

RentalFlow

1. Billing → choose a plan.
2. Connections → add, **Test**.
3. Sync → import warehouses as locations.
4. Users, Branding, Email SMTP, Email templates.

InboxFlow

1. Connections → add, **Test**.
2. Sync → schedule the business-partner sync.
3. Mailboxes → add the mailbox to read.
4. Users → reviewers and viewers.
5. Branding, Email SMTP, Email templates.

7. Troubleshooting

Symptom	What to check
Test fails with a certificate error	The Service Layer uses a self-signed certificate. Install a proper certificate, or (for test systems only) untick Verify TLS certificate .
Test fails with "401" or "Fail to get DB credentials"	Check the SAP user, password and Company DB . The user must be licensed for the Service Layer in SAP.
Test times out	The product cannot reach SAP. Check the URL, the port (normally 50000) and your firewall.
"Demo data" badge still showing	No active connection. Check Active and the Effective from date.
Nothing posts to SAP	You are on the demo licence. Check Billing and click Refresh .
"At billed cap" when adding a connection	Add B1 companies in Billing .
"No seats available" at sign-in	Everyone's seats are in use. Ask someone to sign out, or add seats in Billing .
Emails not arriving	Email SMTP → Send test email . Check spam folders and your mail provider's app-password rules. In RouteFlow, check that Demo mode is off.
User locked out	An administrator issues a new temporary password in Users (RouteFlow: Unlock PIN).