

FieldFlow — User Guide

Field service for SAP Business One: schedule, deliver, install, service, invoice, get paid

OCTOBER 2026 • [SUPPORT.CSC-WORK.COM](https://support.csc-work.com)

Contents

What FieldFlow does

- Roles

Signing in

For dispatchers: the Dispatch board

For the office: the Office console

For technicians: the phone app

- Your day

- Working a job

- Finishing

- When a job cannot be finished

FieldFlow-specific Setup (*admins*)

What FieldFlow does

FieldFlow runs field service from order to payment:

1. The office takes an order, which becomes an SAP **Sales Order**. Jobs are built from **job templates**.
2. **Dispatchers** schedule jobs on a weekly board, one lane per technician.
3. **Technicians** work each job on their phone, **online or offline**. They record time, parts, checklist results, photos, notes, expenses and meter readings, collect a **signature** and take **payment**.
4. Completing a job posts the SAP **invoice**. Fixed-price jobs also post a goods issue. The invoice pack is emailed to the customer.

Each van is a real SAP warehouse, so parts used on a job come out of the right stock. Every posting is protected against duplicates.

Setup basics are in the **Setup & Administration Guide**.

Roles

Role	Uses	Seat
Technician	The phone app	Field seat
Dispatcher	Dispatch board and Office console	Office seat
Admin	Everything, including Setup	Office seat
Viewer	Support only	Office seat

Signing in

FF **FieldFlow Demo** by CSC WORK

SIGN IN

Sign in to FieldFlow Demo

Dispatch — the week of jobs, a lane per technician.

Email

you@company.com

Password

Sign in

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

SIGN IN (OFFICE).

Office staff sign in at your FieldFlow address; the top bar then shows **Dispatch**, **Office** and **Setup**. Technicians open the same address on their phone and install it to the home screen when prompted.

The first time you sign in with a temporary password you are asked to set your own.

For dispatchers: the Dispatch board

The board has **one lane per technician** and **one column per day**. Each cell shows the technician's van that day (or *no van*) and the hours already booked. Choose the **Week beginning** date and show 3, 7 or 14 days.

- **The rail** (at the side) holds jobs that are not yet scheduled. *Scheduled, nobody assigned* holds jobs with a date but no technician.
- **To schedule a job:** drag it from the rail onto a technician and day. On a tablet, tap the job, then tap the day.
 - **Hard rules** refuse the drop. For example, a technician with no van that day cannot take parts jobs.
 - **Warnings** let the drop through but tell you about it, for example overbooking.
- **Back to the rail** unschedules a job.
- When a day is ready, click **Dispatch day**. This freezes each job's materials list, and the technicians' phones pick the work up on their next **Sync**.

For the office: the Office console

Four tiles show the health of the business:

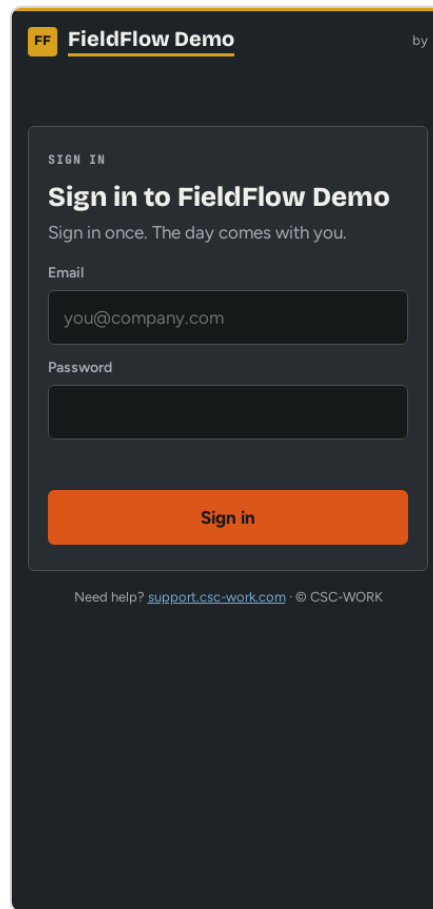
- **first-time fix %**,
- **unbilled**,
- **invoiced but unpaid**,
- **open jobs**.

Below them are the queues that need someone. Each queue has a button that fixes it:

Queue	Button
Unbilled jobs	Post now
Invoiced but unpaid	Take payment
Failed postings	Retry
Invoice packs not sent	Send
Sync exceptions	<i>(review only)</i>

Return trips shows the jobs that needed a second visit, split into *on us* and *on the customer or the site*.

For technicians: the phone app



TECHNICIAN SIGN-IN.

Your day

1. Tap **Sync** while you have signal. Your jobs for the day download, along with everything needed to work them offline.
2. The day screen lists each job with its time, status, customer, address and reason. It warns you about parts that are not on your van and entries still waiting to send.

Working a job

1. Open the job. **Call** the customer or tap **Navigate**. *This address before* shows earlier visits.
2. Tap **Start this job**.
3. **Time**: tap **Travel**, **On site** or **Waiting** as you go, and **Stop** at the end.
4. **Parts**: pick from your van stock, or choose *Something else...*, then tap **Add**.
5. **Checklist**: mark each step **Pass** or **Fail**.
6. **Photos & notes**: **Add photo**, **Add note**, or record an **Expense**.
7. **Meters**: record the readings for metered equipment and tap **Save**.
8. **To bill** shows what the customer will be charged.

Finishing

- Tap **Complete and get a signature**. The customer signs and taps **Done**. If nobody is there, tap *Nobody is here to sign* (if your company allows it).
- **Take payment**: *Use the card on file, Tap a card now, or Leave it unpaid*.
- The invoice posts to SAP and the invoice pack is emailed to the customer.

When a job cannot be finished

Tap **Cannot complete today** and record:

- **What stopped it**: waiting on a part, no access to the site, needs a second pair of hands, waiting on the customer to approve, or abandoned (no return visit).
- **Whose was it**: ours or theirs, and what actually happened.
- **What is needed**: the parts and quantities for the return visit.

Then tap **Close this visit**. A follow-up job is created automatically and goes back to the office.

Anything rejected by the office shows on your day screen under *Refused by the office*.

FieldFlow-specific Setup (*admins*)

Tab	What you set
Vans	Add each van with its Code , Name and B1 warehouse . Use Mark as truck in SAP . Set <i>What it always carries</i> (minimum and top-up level per item). Add Forecast demand.
Technicians	Pick the SAP Employee . Create their login (Make one from SAP), and set their email, Cost rate and Bill rate . Under Who drives what , assign a technician to a van from a date for a number of days; weekends are skipped.
Equipment	Register metered machines: asset tag, customer, site, serial, meter unit (hours, km, miles, m ³ , cycles), Service every and Last serviced at . Choose how early a service visit is raised, and which template it is built from.
Job templates	Name, job type (Install, Task, Delivery, Service), expected minutes, a checklist (one step per line), and materials (one per line, as ITEM-CODE × quantity).
Invoicing	Labour item, fixed-price item, expense item, default bill rate, expense markup %, SAP price list and invoice sender. Choose whether to invoice each visit separately and whether to allow completion without a signature .
Integrations	Payment gateway, gateway key, clearing account and pay-link base. Also shows which other Flow products are connected.
Email templates	<i>Invoice with job sheet</i> and <i>Password reset</i> .

Before the board will accept jobs, every technician needs a van for the day under **Technicians → Who drives what**.