

RouteFlow — User Guide

Delivery planning, loading and proof of delivery for SAP Business One

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What RouteFlow does

RouteFlow takes your open SAP Business One **Sales Orders** and **Return Requests** and turns them into delivery routes. It then follows every route from the dock to the customer's signature:

1. **Plan:** optimises routes three ways (shortest distance, fewest trucks, balanced) so you can compare them.
2. **Commit:** creates the SAP **Deliveries**, opens a mileage trip per route and sends customers their **delivery notice (ASN)**.
3. **Load:** dock staff load each truck last stop first, scanning pallets on a handheld or working from a printed loading sheet.
4. **Deliver:** drivers use the offline **driver app** for navigation, signatures, photos, scans and payments.
5. **Follow up:** customers get a **tracking page** with the bill of lading and a **proof-of-delivery PDF**. Payments post to SAP as Incoming Payments. Returns run through an approval flow and post as SAP Return Requests and Returns.

One RouteFlow plan can cover **several SAP companies**. Each stop keeps its own company's documents, branding and settings.

Setup (connections, sync, users, email, billing) is covered in the **Setup & Administration Guide**. This guide covers daily use and the RouteFlow-only Setup tabs.

Roles

Role	Can do
Admin	Everything, including all of Setup
Dispatcher	Dispatch, fleet, loading and returns; Email templates and Support in Setup
Viewer	Read-only; on Handhelds, cannot push, pull or void
Loader	The dock handheld only, signing in by PIN or badge
Returns approver	A flag on any user: may approve return requests, but never their own

Drivers are not users. They sign in on a **paired phone**, from a **route link** that dispatch sends them, or with their **phone number** (limited access; no odometer readings).

Signing in

The screenshot shows a dark-themed web interface for 'Demo Distributor'. At the top left, there is a logo with 'RF' and the text 'Demo Distributor'. At the top right, it says 'by CSC WORK' and 'CSC-WORK' with a dropdown arrow. The main content area is a dark gray box with the following text: 'SIGN IN', 'Sign in to Demo Distributor', 'Delivery planning, loading and proof of delivery for SAP Business One.', 'EMAIL' (with a text input field), 'PASSWORD' (with a text input field), an orange 'Sign in' button with a key icon, and a note: 'Warehouse loaders sign in on the handheld with a PIN or badge; drivers open their route from the link dispatch sends them.' At the bottom, it says 'Need help? support.csc-work.com · © CSC-WORK'.

SIGN IN TO ROUTEFLOW.

Staff sign in with their email and password. Every page has a **How this page works** help drawer.

Dashboard

The dashboard shows how today is going:

- **Today:** routes out, stops done, on-time, exceptions, returns, cash and trucks down.
- **Summary cards:** Equipment, Drivers, Orders, Returns, Cash collected, SAP posting health, Loading / dock, and Compliance alerts.
- **Orders not on a route:** anything still waiting to be planned.
- **Period KPIs:** last 7 days, this month, yesterday, or a custom range.

Dispatch: planning routes

1. Open **Dispatch**.
2. Choose the **Dispatch date** and the **Phase**: *Preplan* for a first look, *Final* for the plan you will run.
3. Click **Run Dispatch**. RouteFlow builds three **scenarios**. For each it shows Trucks, Total KM, Fill % and Estimated cost, with the routes on the **Route map**.
4. Compare the scenarios and adjust as needed. You can:
 - assign drivers,
 - check **hazmat** warnings,
 - review **Unassigned orders** (orders that did not fit).
5. Click **Commit**. RouteFlow then:
 - creates the SAP Deliveries tagged with route, truck and stop,
 - opens mileage trips,
 - creates loading sessions,
 - emails each customer the *Delivery scheduled* notice.
6. **Print manifest** produces the route manifest.

If a warning stops the commit, you can choose **Commit anyway**. **Un-commit** is possible until something has been posted or delivered.

Carry-over: undelivered stops, short loads and returns that were not collected join the next plan automatically. They are marked *carried from*.

Fleet & master data

Fleet holds your **Trucks**, **Depots** and **Drivers**, along with their compliance details (licences, inspections). Most of this is imported from SAP under Setup → Sync. Details you add in RouteFlow are never overwritten by an import.

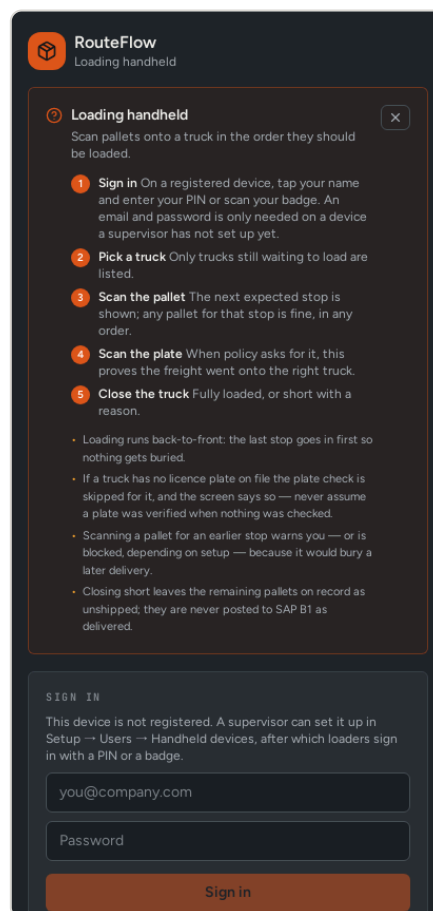
Pairing a driver's phone:

1. Open the driver and click **Pair a phone**. A QR code appears. It works once, for 15 minutes.
2. The driver scans it on their phone and taps **Pair this phone**.
3. From then on the driver taps **Sign in with this phone** (Face ID, fingerprint or screen lock).

Loading

There is one loading session per committed route, sequenced **last stop first**, so the first delivery is nearest the door.

- **Sheet** prints a loading sheet for crews without handhelds.
- With scan-verified loading switched on, loaders use the **handheld**:
 1. Tap their name and enter their PIN or scan their badge.
 2. Pick the truck.
 3. Scan the pallets, then the licence plate.
 4. Close the truck.
- A truck can be closed **short**, with a reason. The shortfall banner then lists the pallets left behind, and they carry over to the next plan.



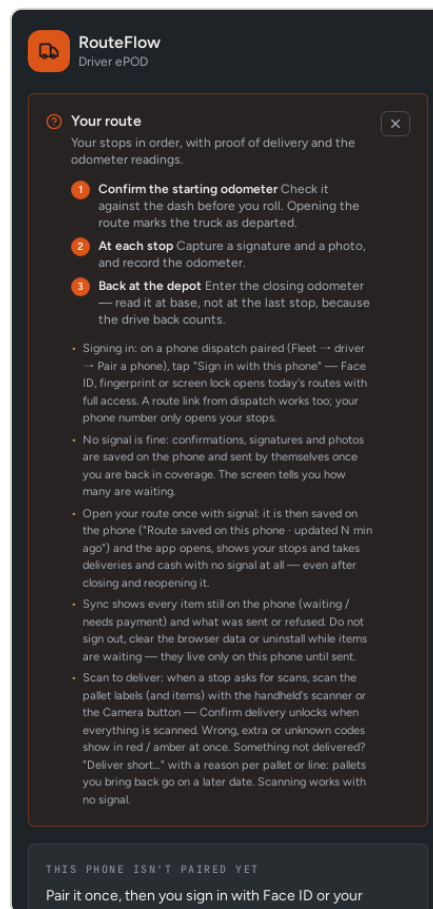
LOADING HANDHELD SIGN-IN.

Board

The **Board** is a wall screen for the dock. It shows Trucks loading, Ready to roll, On the road, Back at depot, Stops done, Pallets loaded and Left behind. Set the horizon and auto-refresh, then go full screen.

A screen with no staff login can use the **screen link** from Setup → SAP Setup → Warehouse board.

The driver app



DRIVER APP SIGN-IN.

Drivers open RouteFlow on their phone (driver.csc-work.com). The app **works offline**: everything is saved on the phone and sent once there is signal.

1. **Start of day**: confirm the **starting odometer** against the dash. Opening the route marks the truck as departed.
2. **At each stop**:
 - Tap **Navigate** to open Google Maps, Sygic, CoPilot or Apple Maps.
 - If the stop requires it, scan the pallets or items.
 - Capture the customer's **signature**.
 - **Take photos** (up to 6).
 - Take a payment if one is due: cash, check or card.
 - Tap **Confirm delivery** (or **Confirm pickup** for a return).
3. **Problems**: tap **Log exception**, or **Deliver short...** with a reason for each missing pallet or line. Anything short comes back on a later date.
4. **End of day**: enter the **Ending odometer** at the depot, then tap **Complete route**.

The **Sync** panel shows what is waiting to send. Tap **Push now** to send it. Do not sign out or clear the browser while items are waiting; until they are sent, they exist only on the phone.

What the customer sees

- **Delivery scheduled (ASN):** sent at commit, with a link to the tracking page.
- **Tracking page:** a map with how many stops away the truck is, and the **bill of lading:** shipper, consignee, carrier, driver, order, delivery note, handling units, weight and volume.
- **Delivered:** an email with the **proof-of-delivery PDF** and the photos attached. The PDF can also be downloaded from the tracking page.
- **Returns:** the customer can start a return from the tracking page (**Return items**).

Mileage, maintenance and costs

- **Mileage** (/mileage) is the odometer chain per truck. Trips open automatically at commit; you can also click **Start trip**. Closed trips can be reopened to correct them.
- **Maintenance** shows trucks Available, In service and with PM due. Here you can:
 - **Record odometer**,
 - **Schedule PM** (preventive maintenance),
 - **Report breakdown**,
 - **Close service**.
- **Costs** shows operating cost, maintenance cost and cost per delivery, broken down by truck and by cost centre. The **Plan vs executed** tab compares the planned routes with what actually happened.

Handhelds: settling driver cash

Handhelds lists what drivers collected, filtered by date, driver and status, with totals for **Cash**, **Check** and **Card**.

1. Filter to the day or route.
2. Click **Preview** to check the receipts.
3. Click **Push to SAP**. This creates SAP Incoming Payments. A receipt can also be voided.
4. **Pull open invoices** refreshes the invoices drivers can collect against. **Export CSV** downloads the list.

Returns (RMA)

1. Click **New return** and find the delivery the goods came on.
2. Choose the items, then **Make request**, or **Make request and email the customer** so they can confirm the items.
3. The customer confirms by email link. You can also tick *Customer confirmed by phone*.
4. A **returns approver** (not the person who made the request) clicks **Approve — create the Return Request**, or **Reject**. When approved:
 - the SAP Return Request is created,
 - the customer is emailed the RMA number and pickup date.
5. The pickup is planned as a return stop on its due date. When the driver confirms the pickup, the SAP **Return** posts (if your posting policy says so).

Statuses: *Open, Waiting for approval, Waiting for customer, Changes asked, Approved, Rejected*.

RouteFlow-specific Setup

SAP Setup (*admins*)

With more than one SAP company, pick the company first. Each company has its own settings.

Section	What you decide
How service is posted	When the SAP Delivery posts: at commit, at truck close, at departure, or at the stop. When the SAP Return posts: not at all (handled in SAP), or when the driver confirms the pickup.
Planning	Whether to leave out Sales Orders that are not <i>Approved</i> in SAP.
Concept → Chart of Accounts	The GL map.
Cash receipts	When a receipt posts; what the driver may do with the money (apply it to this delivery's invoice, leave it on account, change the amount per invoice); whether to email a payment confirmation; whether payment is required before delivery; the cash, check and card accounts; the card payment provider.
Loading flow	Scan-verified loading on or off; plate scan rule (first and last pallet, every pallet, or not required); the out-of-sequence rule (warn, block or no check); whether a truck may be closed short; the pallet source (RouteFlow estimates, or StockFlow SSCCs).
Warehouse board	Count by, horizon, refresh interval, matrix or card view, and the no-login screen link .
SAP fields	Status of the user-defined fields RouteFlow needs (Check again).
Scan to deliver	Default scan level (none, pallets, pallets plus one item, or every item), plus exceptions per customer.
Hazmat	Where SAP marks an item as hazmat; when a hazmat truck and an H/X driver are required; the emergency phone printed on the BOL; segregation rules (Reset to DOT table).

Payment providers (*admins*)

Connect **Stripe** or **PayPal** for card payments taken by drivers. Choose *Test* or *Live* mode, the currency and the default provider.

System (*admins*)

- **License & Tier:** **Refresh license**, the capability ladder, and service health.
- **On-time tolerance** ($\pm$ minutes), used on the dashboard.
- **Driver sign-in:** whether drivers may sign in by phone number.
- **Driver navigation:** the default app, and Imperial or Metric units.

Email templates

RouteFlow sends these emails. Every one can be edited:

- Delivery scheduled (ASN)
- Out for delivery
- Delivered (proof of delivery)
- Delivery exception
- Collection scheduled
- Payment received
- Return request — please confirm the items
- Return request received
- Return approved — RMA and pickup date
- Return request rejected

In the same tab you can:

- choose which emails are **sent automatically**,
- choose whether to **attach the POD**,
- set how many stops away the truck appears on the tracking page,
- list **customers who should not be notified**.