4.19 Flex Grid

**Understanding the Basics:**

The flex grid tie-in application is a standalone mini application or customizable database that rides on top of your entire adilas system. Flex grid has 3 main uses. It can be used as a virtual buddy system, tying things together and creating data relationships. Flex grid also allows you to add additional notes or logs to any of the 12 main players. Another use is to create your own customized database for each of the 12 Main players with up to 15 custom fields and unlimited subs per each main player, to track any special data needs.

Flex grid arches over the entire application because it can be used with, and between, any of the 12 Main players. You can add an unlimited amount of flex grid to an object and flex grid is almost as unlimited in the ways it can be adapted to fit your needs.

**Getting Started:**

Flex grid must be tied to a main or “host” object, one of the 12 main players. To add flex grid, go to the individual object (Such as: Invoice #97, Employee - John Doe, Customer – Jane Smith, E/R # 65, etc.) where the flex grid needs to be attached, and add your flex grid tie in from there. When you are on the main object and have the necessary permissions there will be a link that says “[add new flex grid tie-in]”, there is also a link to view other flex grid pieces already attached there.

To set up your own customized database, go to the flex grid tie in homepage to add and manage your custom fields. With the admin permissions there is a button right in the middle of the Flex Grid Homepage that says “admin – manage custom fields”. We would highly recommend taking some time to plan out what you need/want for your flex grid before going in to set it up. You have 15 custom fields per Main Player Group but the 15 custom fields can contain subs in the form of dynamic drop-down lists, or a combination of a drop-down list and open entry field, it depends on your needs.

Get to the Flex Grid Homepage from the Classic Homepage under System Maintenance – Flex Grid Tie-In Homepage; My Favorites Homepage under Flex Grid Tie-Ins – Flex Grid Homepage; or the Interactive Map under the flex grid tie-ins button at the top.

**Suggested Permissions & Settings:**

**Permissions:**

**Basic Use:**

System Search: “Flex Grid” – this allows a user to search flex grid pieces from the quick search.

System Maintenance: “Add/Edit Flex Grid” – this is the basic flex grid permission and allows a user to add, edit, view and search flex grid pieces.

\*\*\*The 12 Main Players Groups: Though they may be named differently in your adilas application (i.e. if you call your customers – patients, clients, etc.; or your parts – items, services, etc.)

* Balance Sheet Items
* Customers
* Deposits
* Elements of Time
* Employee/Users
* Expense/Receipts
* Invoices
* Parts & General Inventory Items
* PO’s or Purchase Orders
* Quotes
* Stock/Units – Serialized Inventory
* Vendors

**Admin Use:**

System Maintenance: “Admin Flex Grid” – the admin level for flex grid allows the user to setup the custom fields, essentially creating a miniature customized database for the information you need to track for that main player group. With 15 custom fields available for each of the 12 main players, and potentially unlimited subs this creates a very expandable and flexible mini application.

**Related Pages & Help File Links:**

Flex Grid Tie-In Homepage: Helps with understanding flex grid, getting started with lots of good information and some examples for using flex grid.

<https://www.adilas.biz/top_secret/help.cfm?id=323&pwd=flex>

Admin – Manage Custom Fields: This page is where you set up your custom fields or your custom database. There are a lot of options here, you can pre-set your subs or just leave it as an open entry field.

<https://www.adilas.biz/top_secret/help.cfm?id=324&pwd=flex>

Add/Edit Flex Grid Tie-In: This page is going through the actual process of adding new pieces of flex grid or editing existing pieces of flex grid. This page comes up after you have linked from the “[add new flex grid tie-in]” from an individual object page.

<https://www.adilas.biz/top_secret/help.cfm?id=326&pwd=flex>

**Additional Content:**

* Graphic:
  + Where the 12 main players are in green & flex grid highlighted in yellow on the interactive map
* Lots of good videos on this --- but that can come later
* Or even showing some screen shots of some Flex Grid custom set up pages – this helps me have an idea of the organization – what it looks like to have all Open Entry – what it looks like when you have populated subs, etc.
* The Teacher site and The Seamstress both have some good flex grid pieces you can show… I’m sure there are others too.