FlexPatrol Admin

User Guide

FlexSystems

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Table of Contents

Table of Contents 2
1. Introduction 4
1.1 What is FlexPatrol 4
1.2 Who This Manual Is For 4
1.3 How Access Works 4
2. Getting Started 5
2.1 Logging In 5
2.2 Navigating the App 5
2.3 Signing Out 5
3. Dashboard 6
3.1 Overview Stat Cards 6
3.2 Recent Activity 6
3.3 Performance Metrics (per route) 6
3.4 GPS Map (per route) 6
3.5 Opening a Single Route 6
3.6 Printing the Dashboard 7
4. Reports 8
4.1 Reports Landing Page 8
4.2 Patrol Report 8
Filtering & Sorting 8
Understanding Result 8
Q&A Detail, Photos, and GPS Tags 8
Printing 9
4.3 Last PDA Download 9
4.4 GPS Map Report 9
4.5 Performance Metrics Report 9
4.6 Configuration Reports 9
4.7 SOP Maintenance Report 9
Referenced By 9
Reviewing a Checklist 10
Filtering, Export & Printing 10
5. Automated Reports & Email Settings 11
5.1 Report Types 11
5.2 Managing Recipients 11

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5.3 Email Server Settings 11
5.4 On-Demand Test Send 11
6. Setup: Customers, Sites, Routes, Points & Questions 12
6.1 Customers 12
6.2 Sites 12
6.3 Routes 12
6.4 Points 12
6.5 Questions 12
7. Setup: Operators 14
8. Setup: Users & Access Control 15
8.1 Creating and Managing Logins 15
8.2 Company/Site Access 15
8.3 Edit Access & Permissions 15
9. Setup: Question Library 17
10. Setup: Incident / Activity Setup 18
11. Setup: SOP Maintenance 19
11.1 Creating, Renaming & Deleting an SOP 19
11.2 Editing an SOP's Questions 19
12. Setup: Update PDA Files 20
13. Setup: Edit / Import Points 21
12.1 Bulk-Importing Points from a Spreadsheet 21
12.2 Editing an Existing Point 21
14. Setup: PDA Emulator 22
13.1 Starting a Simulated Patrol 22
13.2 Answering Questions & Following Jumps 22
13.3 Incidents & End of Route 22
13.4 Submitting Test Data (Optional) 22
15. Setup: Device Setup Code 23
16. Setup: Audit Trail 24
17. Setup: Customers & Databases (Internal Administration) 25
18. Security & Data Isolation 26
19. Appendix: Merged Visits & the Fail-Wins Rule 27
20. Support 28

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1. Introduction

1.1 What is FlexPatrol

FlexPatrol is a web-based facilities data collection and management system. Security and facilities operators carry handheld PDA devices (barcode or NFC scanners) on their rounds, scanning checkpoints and answering configured inspection questions at each one. Every scan — including GPS location, photos, and question answers — is uploaded and made available in real time through the FlexPatrol web application covered in this manual.

Supervisors and administrators use the web application to review patrol activity, run reports, receive automated daily summaries, and configure the checkpoints, routes, and questions that operators are guided through in the field.

1.2 Who This Manual Is For

This manual covers two audiences in one document:

- End users (supervisors, managers, and anyone reviewing patrol activity) — Sections 3–5.
- Administrators (anyone configuring customers, sites, routes, operators, and system settings) — Sections 6–20.

Which sections are relevant to you depends on the access your login has been granted (see Section 8.2, Company/Site Access).

1.3 How Access Works

FlexPatrol is multi-tenant: each customer's data lives in its own separate database, and every customer is given a private login link. There is no shared login page listing multiple companies — your organization's FlexSystems contact will give you the exact web address to bookmark.

> **NOTE:** A FlexPatrol login for one customer can never see another customer's data. There is no page anywhere in the product that lists or reveals other tenants. This is enforced on every request, not just hidden in the menus.

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2. Getting Started

2.1 Logging In

1. Open the private login link provided by your FlexSystems contact.
2. Enter your User Code and Password.
3. Click Sign In.

If you've forgotten your password, contact your organization's FlexPatrol administrator — they can reset it from User Setup (Section 8).

2.2 Navigating the App

After signing in you'll see a sidebar with four sections:

- Dashboard — a live overview of recent patrol activity, organized by route.
- Setup — where administrators configure customers, sites, routes, operators, users, and system behavior.
- Reports — the full library of patrol, GPS, performance, and configuration reports.
- Transactions — the most recent PDA download batch (Section 4.3).

Which of these you can see depends on your login's permissions.

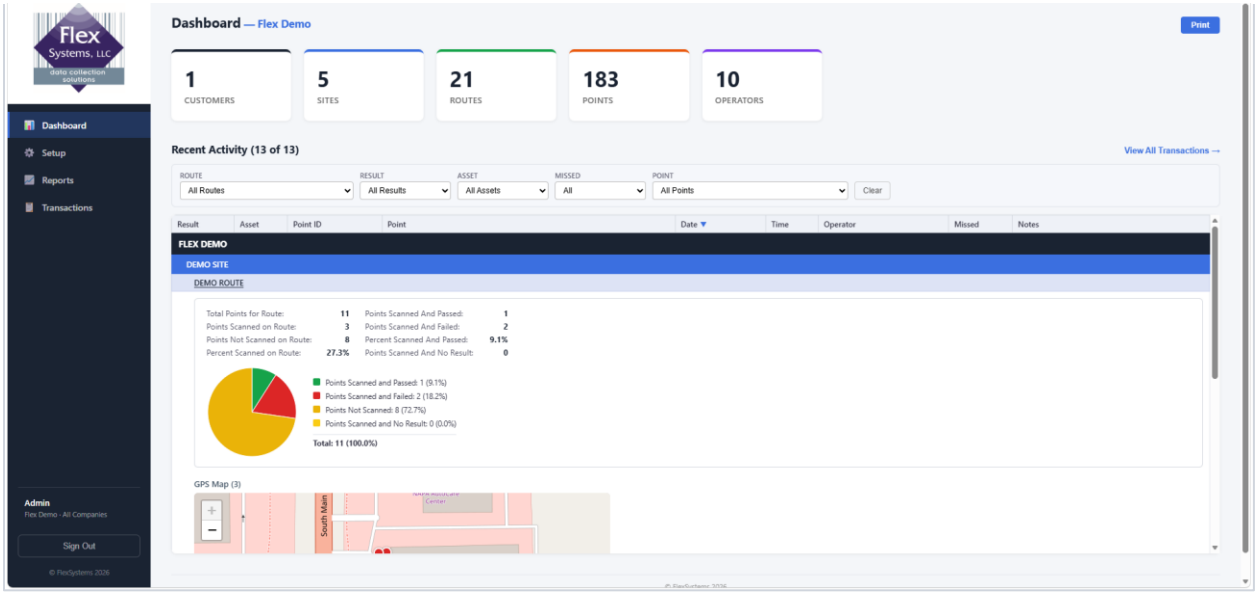
2.3 Signing Out

Click Sign Out at the bottom of the sidebar at any time. This ends your session immediately.

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3. Dashboard

The Dashboard is the home screen and gives a live, at-a-glance view of patrol activity.



The Dashboard: organization totals at the top, recent activity with a performance breakdown and GPS map below.

3.1 Overview Stat Cards

Across the top, five cards show your organization's totals: Customers, Sites, Routes, Points, and Operators.

3.2 Recent Activity

The Recent Activity table lists patrol transactions grouped by Customer → Site → Route, most recent first — it always shows the latest PDA sync batch, the same data as Transactions (Section 4.3), with no date-range control of its own. Filter it by Route, Result, Asset, Missed status, or Point using the dropdowns above the table.

Click any transaction row to expand its recorded question-and-answer detail. Answers that differ from the expected response are highlighted in red as exceptions.

3.3 Performance Metrics (per route)

Directly beneath each route's heading in Recent Activity, a Performance Metrics panel shows that route's point coverage for the selected date range: total points, how many were scanned versus not scanned, and how many passed, failed, or came back with no result — plus a pie chart breakdown.

3.4 GPS Map (per route)

Below each route's Performance Metrics panel, a small map plots that route's GPS-tagged scans. Markers are colored green (Pass), red (Fail), orange (Missed), or gray (No Result).

3.5 Opening a Single Route

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Click a route's name in Recent Activity to jump straight to the Patrol Report (Section 4.2), pre-filtered to just that route — useful when you want to dig into one route's full history, sort it, or print it.

3.6 Printing the Dashboard

Click Print in the top-right of the Dashboard to produce a clean, browser-printed copy. Filter controls and buttons are automatically hidden from the printed page.

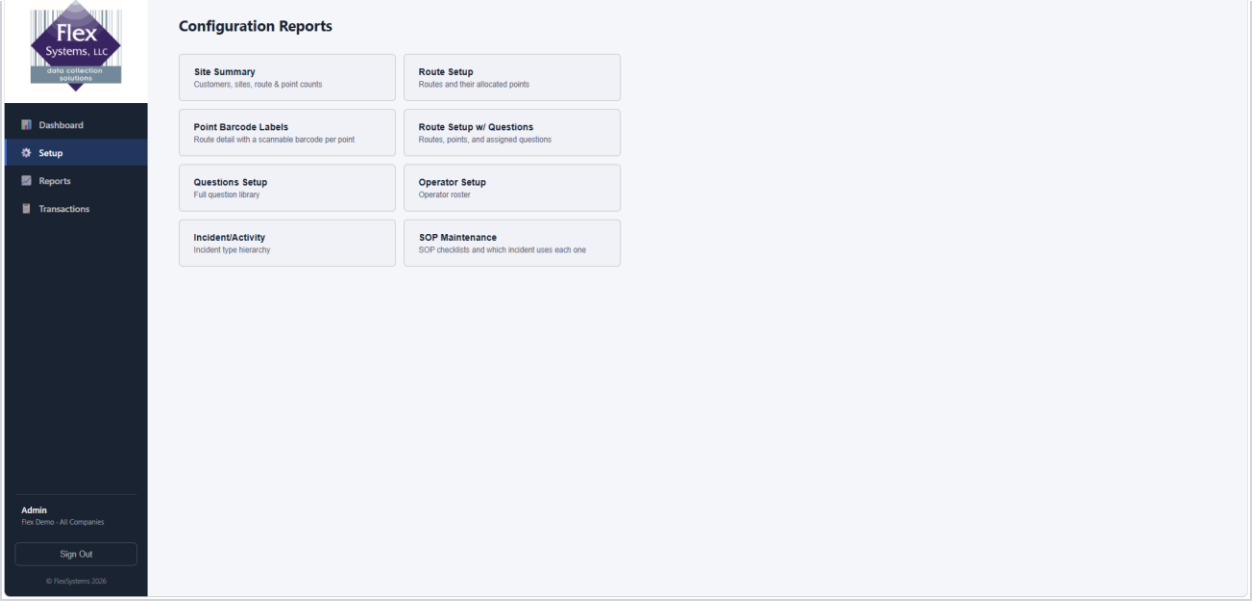
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4. Reports

The Reports section is the full library of operational and configuration reports. Open it from the sidebar.

4.1 Reports Landing Page

Three report tiles are listed here — Patrol Report, GPS Map Report, and Performance Metrics Report — each with a short description; click through to open one. The other two report-like screens covered in this section, 4.3 Last PDA Download and 4.6 Configuration Reports, are opened from elsewhere — the sidebar's Transactions page and Setup → Configuration Reports, respectively — not from this landing page.



The Reports landing page.

4.2 Patrol Report

The Patrol Report is the full transaction history — every recorded scan, filterable and sortable, grouped by Customer → Site → Route.

Filtering & Sorting

Filter by Route, Operator, Result, Asset, Missed status, Point, and a From/To date range (defaults to the last 30 days). Click any column heading to sort by it; click again to reverse the order.

Understanding Result

The Result column shows Pass, Fail, Missed, or — (no result). A checkpoint marked Missed is never shown as Passed, regardless of what the underlying inspection answer might otherwise suggest.

> **NOTE:** Some checkpoint visits are recorded across more than one underlying scan record — for example, an equipment sub-inspection embedded partway through a point visit. FlexPatrol automatically combines these into a single row. If any part of that combined visit failed, the whole row shows Fail — a failing detail is never hidden behind an otherwise-passing visit.

Q&A Detail, Photos, and GPS Tags

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Click a row to expand the questions and answers recorded at that checkpoint. Exceptions (answers that don't match the expected response) are highlighted in red. If a photo was captured at that checkpoint, it displays inline in the Notes column; GPS coordinates recorded with a scan are shown as a location tag.

Printing

Click Print for a clean landscape-formatted printout of the currently filtered report.

4.3 Last PDA Download

Shows only the most recent batch of scans downloaded from PDA devices — useful right after a sync to confirm what just came in, without scrolling through full history. Supports the same filtering, sorting, merged-visit, and photo behavior as the Patrol Report.

4.4 GPS Map Report

A full-size map of every GPS-tagged scan across your organization, with the same color-coded markers used on the Dashboard.

4.5 Performance Metrics Report

A dedicated, printable version of the per-route performance breakdown shown inline on the Dashboard — total points, scanned vs. not scanned, and pass/fail/no-result counts with a pie chart, for every active route.

4.6 Configuration Reports

Eight printable reference reports summarizing how your system is set up:

- Site Summary — customers, sites, and their route/point/operator counts.
- Route Setup — every route and the points allocated to it.
- Point Barcode Labels — a route's points formatted with a scannable barcode per point, ready to print and affix.
- Route Setup w/ Questions — every route's points and the questions assigned to each.
- Questions Setup — the full question library, grouped by category.
- Operator Setup — all registered patrol operators.
- Incident/Activity — the configured incident/activity type hierarchy.
- SOP Maintenance — every Standard Operating Procedure checklist in the system, whether it's referenced by an incident or not, with each one's full question branching shown as an expandable tree.

4.7 SOP Maintenance Report

The SOP Maintenance report lists every Standard Operating Procedure checklist configured in the system — every question sequence attached to the special Incidents1 route that holds the full SOP library — regardless of whether any incident currently references it. It's the place to audit the complete library in one screen, not just the SOPs an incident happens to point to.

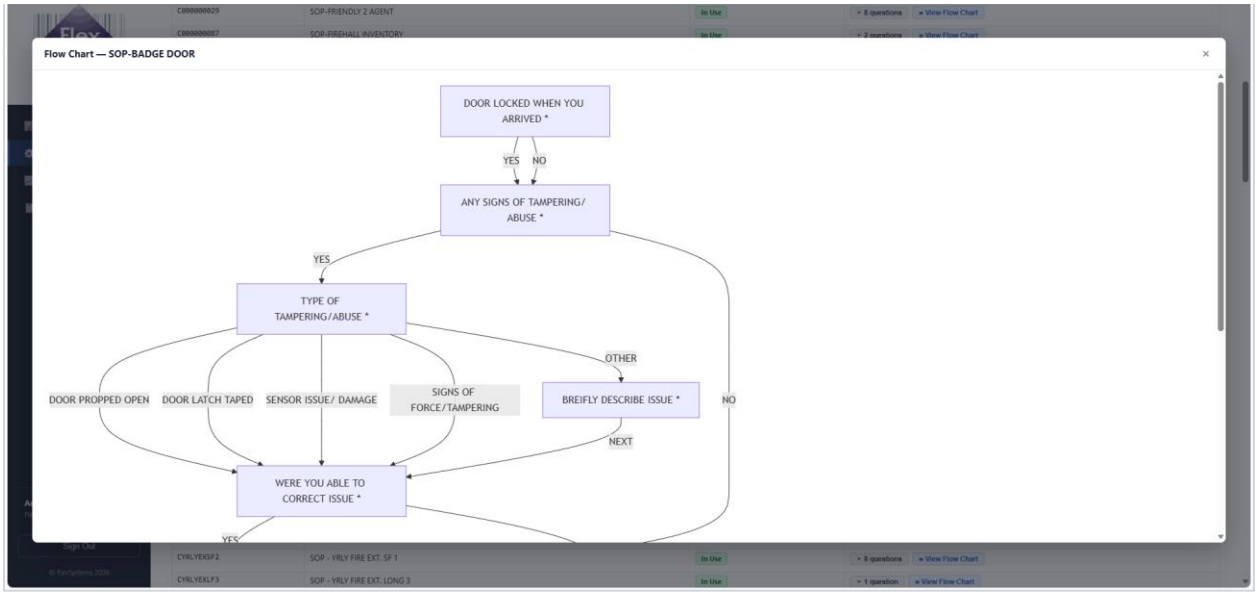
Referenced By

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Each row's Referenced By column shows one of three states: the name of the incident that uses this SOP directly; a green "In Use" badge if the SOP is reachable as a jump target from some route's checklist even though no incident references it; or a red "Unused" badge if neither is true.

Reviewing a Checklist

Click a row's question count to expand its full branch tree — every answer option and where it leads, whether that's another question, an exit point, or logging an incident — nested to show multi-step branching. Expand All and Collapse All controls above the table let you review the entire library at once. The View Flow Chart button on each row opens the same logic as a visual flow-chart diagram, useful for reviewing or explaining a complex procedure at a glance.



The View Flow Chart diagram for an SOP checklist.

Filtering, Export & Printing

Search filters the list by ID or description, and the Unused Only checkbox narrows it to SOPs that aren't currently referenced anywhere. Like the other reports, SOP Maintenance supports CSV export and a clean printed copy.

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5. Automated Reports & Email Settings

FlexPatrol can automatically generate and email PDF reports on a schedule or in response to activity, without anyone needing to log in and run them manually. Each report type is sent to its own list of recipients, configured per customer (Section 17).

5.1 Report Types

Four kinds of automated report are available, each toggled on independently per recipient:

- Daily Report — a PDF covering the previous 24 hours, sent once a day.
- Monthly Report — the same report format, covering the complete previous calendar month, sent on the 1st.
- Download Report — a full report scoped to just the most recent PDA sync batch, sent automatically each time a new one lands.
- Invalid Response Alert — a short report listing only Fails, Missed points, and exception answers from the most recent sync batch. Sent only when that batch actually contains something flagged, so a clean sync generates no email.

5.2 Managing Recipients

Recipients are managed from Customers & Databases → Edit (Section 17). Each customer can have any number of recipient email addresses, and each address has its own four checkboxes — Daily, Monthly, Download, Invalid Alert — so the same person can receive some report types and not others, and different people can be subscribed to different reports for the same customer.

NOTE: To pause a recipient's report without deleting them, simply uncheck the relevant box and save — there's no need to remove the entry.

5.3 Email Server Settings

The outgoing mail server used to send every automated report is configured once, from the same Customers & Databases screen, under Email Settings (SMTP). Enter the host, port, username, from-address, and password; leave the password field blank when saving to keep the currently configured one unchanged.

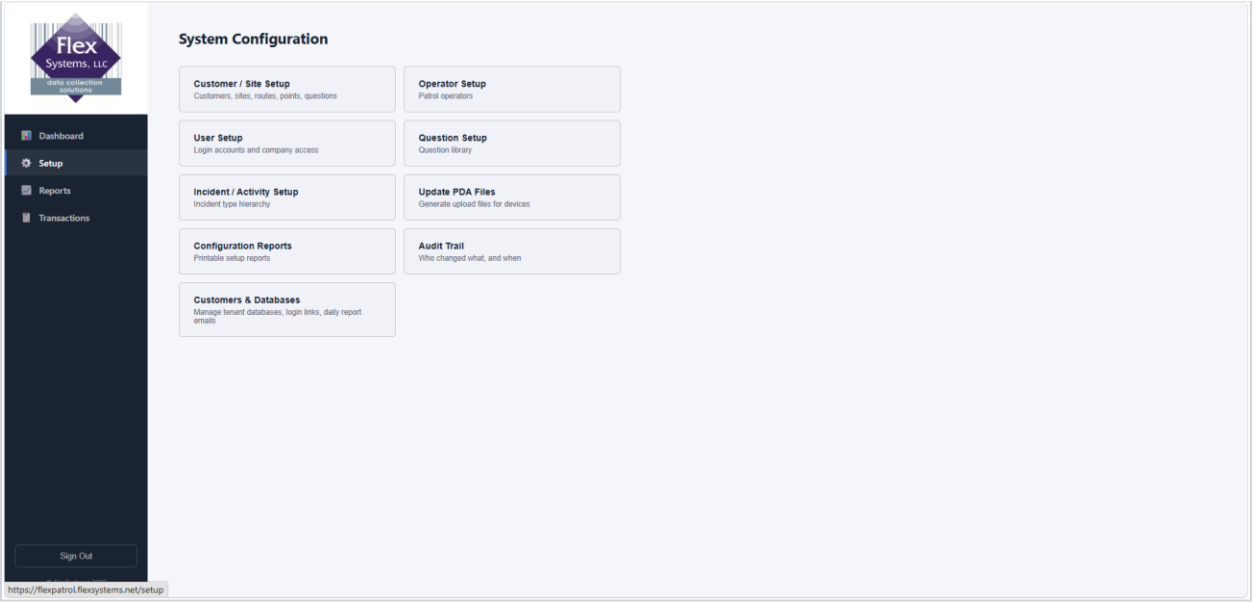
5.4 On-Demand Test Send

An administrator can trigger an immediate copy of a customer's daily report at any time by clicking Send Test Email next to that customer in Customers & Databases — the same code path the scheduled daily task uses. Useful for confirming recipients and email settings are configured correctly before waiting for the next scheduled run.

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6. Setup: Customers, Sites, Routes, Points & Questions

Administrators configure the physical structure being patrolled through a five-level hierarchy: Customer → Site → Route → Point → Question. Open Setup → Customer / Site Setup to begin.



The Setup menu.

6.1 Customers

A Customer is the top-level organization being patrolled (in a single-customer deployment, there is normally just one). Add new customers from the Customer Setup screen — existing customers aren't edited or removed from this screen.

6.2 Sites

Each Customer has one or more Sites — physical locations or buildings. Click into a customer to view its sites and drill into their routes; sites themselves are view-only on this screen.

6.3 Routes

Each Site has one or more Routes — a defined sequence of checkpoints an operator patrols in one pass. Routes are managed from within a site.

6.4 Points

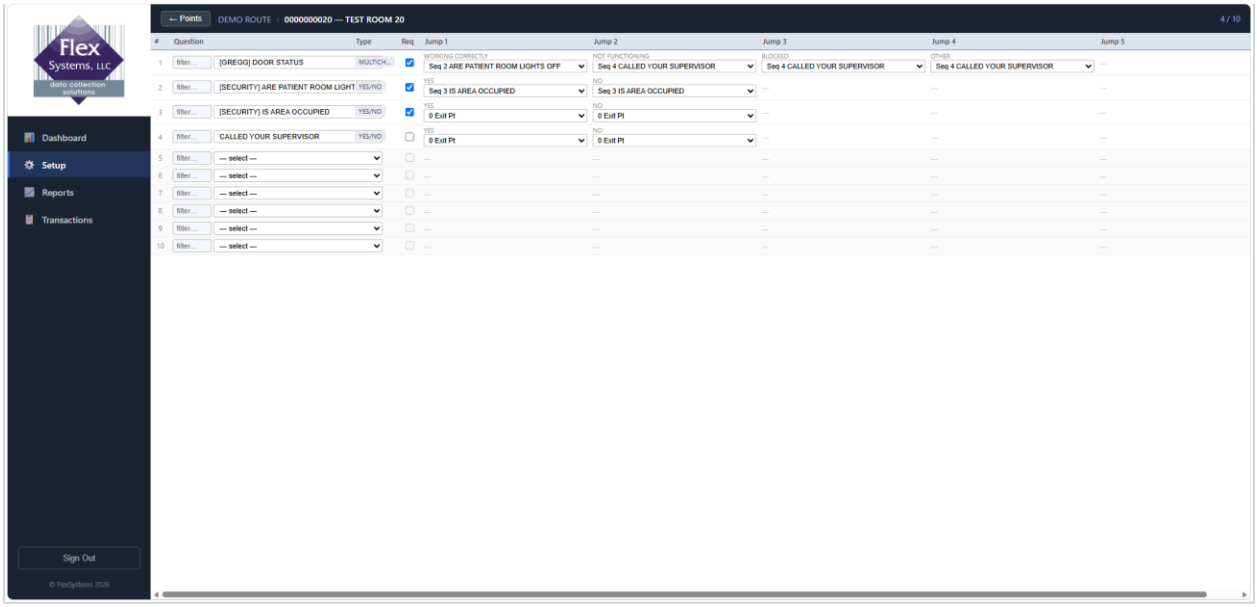
A Point is a single physical checkpoint on a route (a door, a fire extinguisher, an office, etc.). Add new points inline while editing a route, or manage the full point list separately.

6.5 Questions

Each point can have one or more Questions assigned to it — what the operator is asked to check or answer when they scan that point. Question types include yes/no, multiple choice, multi-select, numeric entry, barcode/asset scans, picklists, show-file, and signature capture. Some questions can jump the operator to a

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different question sequence (for example, an equipment sub-inspection, or branching into SOP questions after an incident is logged).

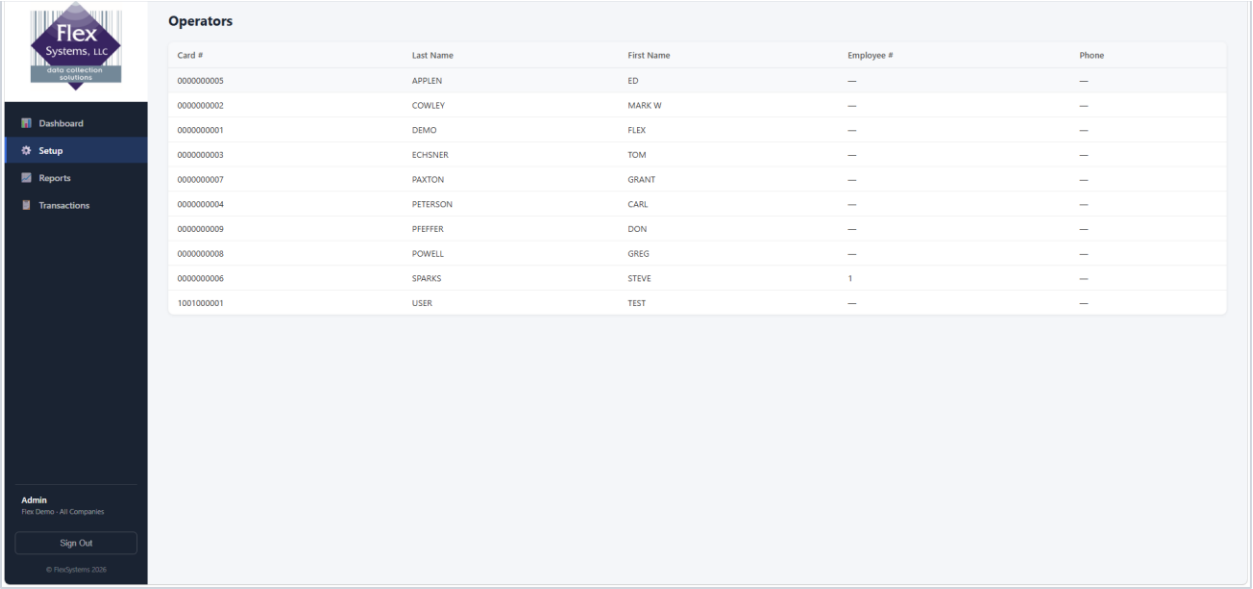


Editing a point's question sequence, including jump targets for each answer.

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7. Setup: Operators

Operator Setup maintains the roster of patrol staff who carry PDA devices, including the card/badge number their device authenticates with. Operator names appear throughout reports as the person who performed each scan.



The Operator Setup roster.

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8. Setup: Users & Access Control

8.1 Creating and Managing Logins

User Setup manages the login accounts used to sign in to the FlexPatrol web application (distinct from Operators, who use PDA devices in the field). From here you can:

- Create a new user with a User Code and initial password.
- Reset an existing user's password.
- Delete a user, immediately revoking their access.

8.2 Company/Site Access

Each user is granted either:

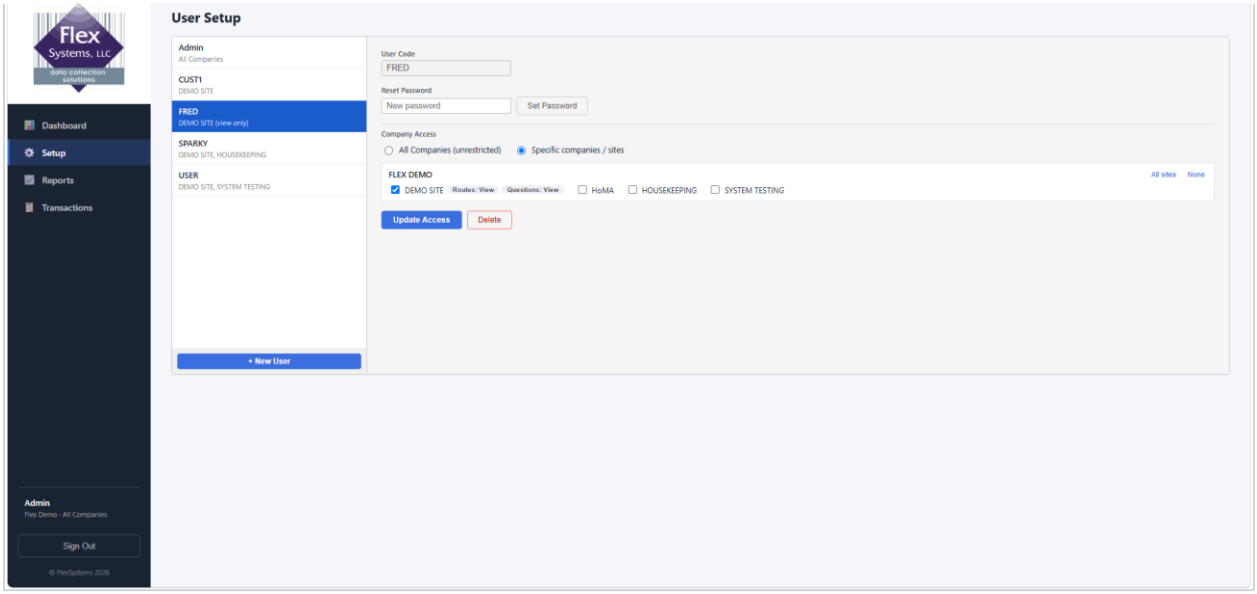
- All Companies (unrestricted) — can see and manage every customer and site, or
- Specific companies / sites — restricted to only the sites explicitly checked for them.

> **NOTE:** Access restrictions are enforced everywhere, not just in the menus — reports, dashboards, and every setup screen for creating or editing customers, sites, routes, points, and their questions all respect a restricted user's assigned sites. A restricted user cannot see, and cannot create or modify, data outside the sites they've been granted.

8.3 Edit Access & Permissions

Beyond which sites a user can see, each site grant can independently be set to Edit or View Only. A view-only user can see everything for that site — dashboard, reports, and every setup screen — but every create, update, and delete action is blocked.

Edit access can also be split by module: a user can be granted edit rights to Routes & Points (routes, points, and the questions assigned to them) separately from edit rights to the Question Library (the master question list shared across every route). A user could, for example, edit a site's routes and points without being able to touch the shared question library, or the reverse.



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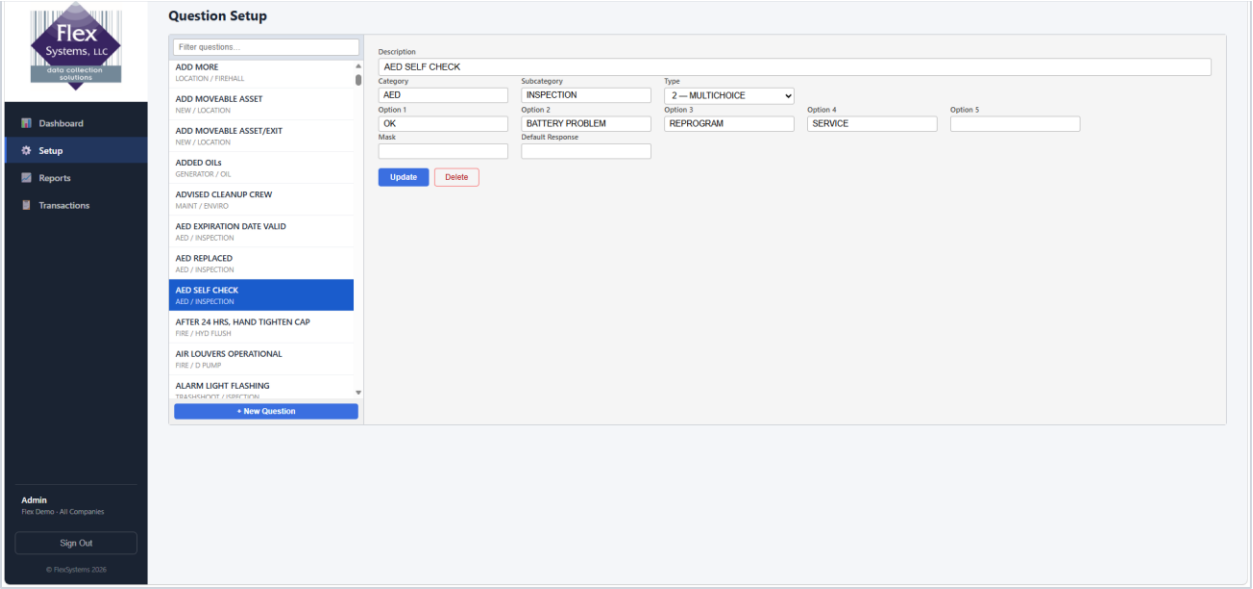
A view-only user (FRED) restricted to Demo Site, with Routes and Questions access both set to View.

> **NOTE:** These distinctions are enforced the same way site access is — everywhere, not just in the menus. A view-only grant, or a module left unchecked, blocks the matching create, update, and delete actions on every setup screen and API request, not just the button that would normally trigger them.

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9. Setup: Question Library

Question Setup manages the master library of inspection questions available to assign to route points, independent of any one route. Create, edit, or retire questions here; changes apply everywhere that question is used.

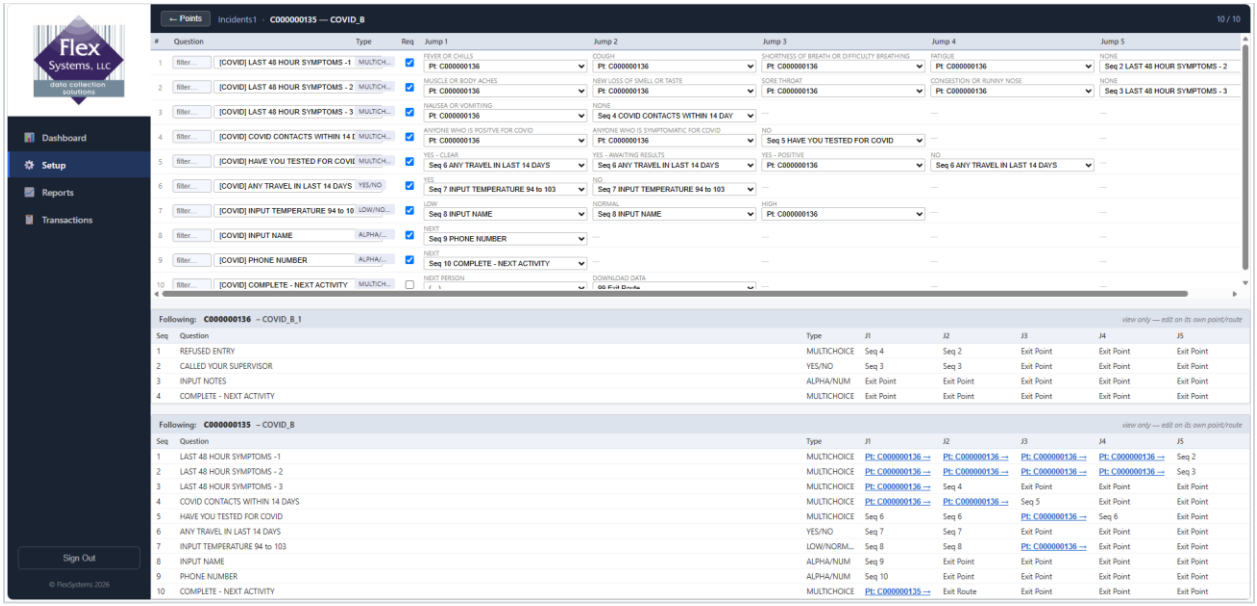


Editing a question in the master library.

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10. Setup: Incident / Activity Setup

Defines the incident and activity type hierarchy operators select from when logging an incident in the field: an Incident Master category, with up to three levels of sub-categories beneath it (Sub Cat 1, 2, and 3).



A question sequence branching into SOP questions after an incident (here, a COVID screening).

Any level of the hierarchy can optionally be configured to jump the operator into a set of Standard Operating Procedure (SOP) questions immediately after the incident is selected — for example, prompting a checklist of required follow-up actions for a specific incident type.

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11. Setup: SOP Maintenance

SOP Maintenance is a flat directory of every Standard Operating Procedure checklist in the system, independent of which incident (if any) currently references it — the editing counterpart to the read-only SOP Maintenance Report (Section 4.7). Open Setup → SOP Maintenance, or click SOP Maint → from the Incident / Activity Setup screen.

11.1 Creating, Renaming & Deleting an SOP

Filter the list by code or description, or click + New to create one with a Code and Description. Selecting an existing SOP shows which Incident currently references it, if any. Deleting an SOP also removes its full question set — if an incident still references it, you're warned that incident's SOP link will break before the delete is confirmed.

11.2 Editing an SOP's Questions

Click Questions → to open the selected SOP's question sequence in the same Question Setup screen used for route points (Section 6.5) — an SOP is built from the same question types and jump logic as any other checklist.

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12. Setup: Update PDA Files

Generates the data files handheld PDA devices download during their sync process — sites, routes, points, questions, operators, and incident categories, translated into the flat-file format the devices expect. Each configured site group has its own Generate button, or click Generate All Sites to regenerate every group in one pass; an expandable reference table on the same screen explains what each generated file (SITE.TXT, ROUTE.TXT, POINTS.TXT, QDATA.TXT, and others) contains. Use this after making configuration changes that field devices need to pick up (a new route, an added question, a new operator, etc.).

> **NOTE:** Devices only pick up configuration changes the next time they sync. If a change doesn't appear in the field, confirm the PDA files were regenerated after the change was made.

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13. Setup: Edit / Import Points

Points are usually added inline while editing a route (Section 6.4), but two additional tools handle bulk setup and later corrections: importing many points from a spreadsheet at once, and editing a point's details independent of any one route. Open Setup → Edit / Import Points, or click Edit Points → from the Route Setup screen for the same page pre-oriented to the current site.

12.1 Bulk-Importing Points from a Spreadsheet

Select a Site and a Route, optionally choose Preload questions from another point on this route to copy an existing point's full question sequence onto every newly created point, then upload an .xlsx spreadsheet and click Import.

The spreadsheet needs four columns, in this order:

- Point ID — the point's unique code.
- Point Description
- Type — read but currently ignored; every imported point is created as a standard barcode/NFC checkpoint.
- Location

> **NOTE:** If a Point ID in the spreadsheet already exists anywhere in the system, its description and location are left unchanged — the same physical checkpoint is often patrolled on more than one route, each with its own checklist, so the existing point is reused rather than overwritten. It's still allocated onto the selected route (and preloaded, if requested) if it wasn't already on it. Import stops reading at the first fully blank row, so a template's leftover instruction text below the data is never imported as a point.

12.2 Editing an Existing Point

Select a Site to list every point already created for it, click a point in the list, and update its Description, Location, or PDA Notes 1–5. Points are edited independent of any particular route, since the same point can be allocated to several.

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14. Setup: PDA Emulator

The PDA Emulator walks a route and its full checklist logic exactly as a real handheld device would — scanning points, answering every question type, following jumps and clone-jump destinations, logging incidents, and ending the route with missed points handled the same way — without needing a PDA. It's the fastest way to test a new or edited question sequence before it reaches the field. Open Setup → PDA Emulator.

13.1 Starting a Simulated Patrol

Choose an operator and a route, then click Start Patrol. If the route has a point whose code begins with FIRST, it's scanned automatically the instant the patrol screen opens, matching how a real device auto-scans a route's FIRSTPOINT without waiting for a manual scan.

13.2 Answering Questions & Following Jumps

Scan (or type) a point's code to open its checklist and answer each question as configured — every question type is supported, including lookups and rollups read live from that site's XML list files. A Back button steps to the previous question (undoing its recorded answer) if one was answered this visit, or backs out to the point list entirely if not. Clone jumps are followed automatically with no answer recorded, matching how a real device treats them as navigation only.

13.3 Incidents & End of Route

A question that jumps to incident logging opens the same Incident / Activity picker used in the field, including any configured SOP follow-up questions. Click END ROUTE at any time to finish: every point not yet scanned is listed as missed, and a reason must be selected for each one before the route can be exited.

> **NOTE:** Points whose code starts with C, V, or H (Clone, Virtual, or Half-clone) are never listed as missed — they exist only as SOP jump targets, not standalone checkpoints an operator would scan directly, matching the real PDA's missed-point logic exactly.

13.4 Submitting Test Data (Optional)

The End Route summary optionally lets you submit the simulated visits as real transactions, exactly as a device sync would — useful for confirming a question sequence produces the report output you expect.

> **NOTE:** Every transaction created this way is tagged internally so it can be found and removed later without hunting through real patrol history.

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15. Setup: Device Setup Code

Configures a FlexPatrol Mobile device in a single scan — FTP connection details plus GPS, camera, and barcode-scanning settings — instead of an administrator typing them into the device by hand. Open Setup → Device Setup Code.

Fill in the Remote Host, Local Host, Port, Username, and Password for the site's FTP server, along with the upload and download paths, then set the GPS Checkpoint Tagging, Auto-Sync at End of Route, and Enable Camera toggles, and check any combination of scanning methods to enable (Phone Camera, Wedge Scanner, QR Code, NFC, Manual Entry). Clicking Generate QR Code produces a single code containing every setting.

The FlexPatrol Mobile app has no manual settings screen — a device is configured entirely through its Device Setup screen (Main → Device Setup), which offers three ways to apply this configuration:

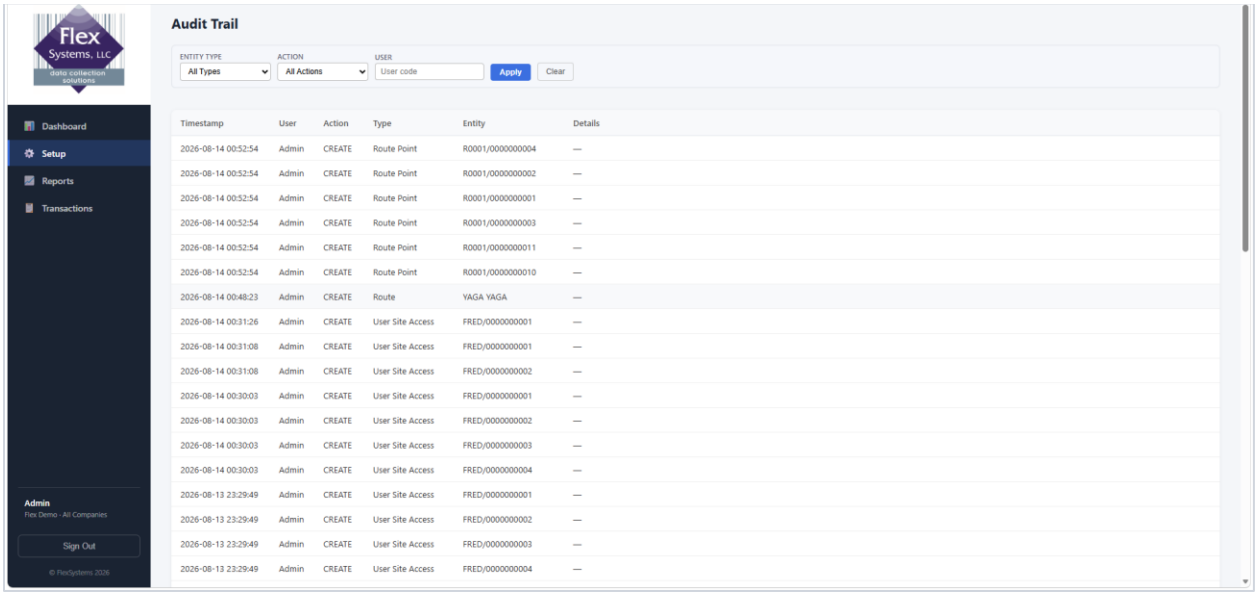
- Scan QR Code — scans the code generated on this screen with the phone's camera.
- Scan NFC Tag — reads the same settings from an NFC tag written with this code, on devices with NFC hardware.
- Manual Entry — types the same fields and toggles directly into the device as a fallback when scanning isn't practical.

> **NOTE:** The FTP password is embedded in the generated QR code (and NFC tag) as plain text. Treat a printed or displayed setup code the same as you would the password itself.

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16. Setup: Audit Trail

The Audit Trail is an automatic, tamper-evident log of every configuration change made anywhere in Setup — who made it, what type of record it touched, and what changed. No manual logging is required; every create, update, and delete across Setup is captured automatically.



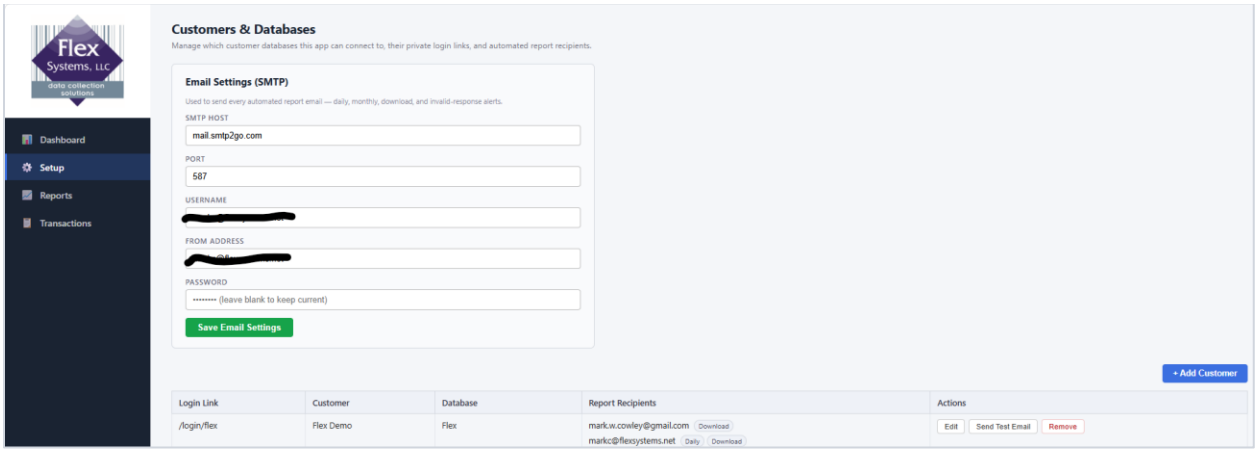
The Audit Trail, showing a run of automatically logged Create actions.

Filter the log by entity type (Customer, Site, Route, Point, Question, Operator, User, and more), by action (Create/Update/Delete), or by the user who made the change.

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17. Setup: Customers & Databases (Internal Administration)

Visible only to FlexSystems' own internal administrative login, this screen manages the tenant registry itself — which customer databases exist, each one's private login link, its automated report recipients, and the email server used to send them (Section 5).



Customers & Databases, including the shared SMTP settings used for every automated report.

- Add, edit, or remove a tenant entry.
- Manage report recipients — add or remove email addresses per tenant, and toggle which report types (Daily, Monthly, Download, Invalid Alert) each one receives (Section 5.2).
- Configure Email Settings — the SMTP host, port, username, from-address, and password used to send every automated report (Section 5.3).
- Send Test Email — generates and emails an on-demand copy of that tenant's daily report immediately, without waiting for the scheduled run.

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18. Security & Data Isolation

FlexPatrol’s security model rests on three pillars:

- Private per-tenant logins — there is no public or shared list of customers anywhere in the product; each customer is given its own login link.
- Database-level isolation — each customer’s data lives in a fully separate database, not just filtered rows in a shared one.
- Per-user access control — within a tenant, a user’s login can be further restricted to specific sites, enforced consistently across every screen and report (Section 8.2).

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19. Appendix: Merged Visits & the Fail-Wins Rule

A PDA device occasionally records a single physical checkpoint visit as more than one underlying scan — for instance, an embedded equipment sub-inspection with its own pass/fail result, sandwiched inside the surrounding point visit. Rather than showing these as separate, confusing rows, FlexPatrol combines them into a single visit wherever they appear: the Dashboard, the Patrol Report, the Last PDA Download report, and the daily emailed PDF.

> **NOTE:** The combined rule is simple and consistent everywhere: if any part of a merged visit failed, the whole visit shows Fail. A passing outer scan never hides a failing detail recorded within the same visit.

Expanding a merged row shows every underlying answer, with any equipment/asset sub-scan clearly labeled so its answers stay traceable to that specific asset.

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20. Support

For access issues, configuration questions, or anything not covered in this manual, contact your organization’s FlexPatrol administrator, or reach out to FlexSystems directly.

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