



Resources

Manage all the people, equipment, and venues your business relies on — in one place. Resources can be assigned to projects and appointments, with rates and availability tracked throughout.

Key Features

- **Resource Types:** Organize resources into People (employees, subcontractors, vendors, white label), Equipment (gear, vehicles), and Venues
- **At-a-Glance Stats:** Dashboard cards show total counts for People, Equipment, Venues, and Active resources
- **Quick Filters:** Switch between All, People, Equipment, and Venues with one click
- **Rate Tracking:** Store hourly and day rates per resource in your preferred currency (USD, EUR, GBP, CAD)
- **Assignment Count:** See at a glance how many projects or appointments each resource is linked to
- **Calendar Colors:** Assign a color to each resource for easy identification on calendars
- **Equipment Details:** Track serial numbers, purchase dates, condition, and quantity for gear and vehicles

- **Status Management:** Mark resources as Active, Inactive, or On Leave

How to Use

Add a Resource

1. Click **Add Resource** in the top-right corner
2. Enter the resource name and select a type (Employee, Subcontractor, Vendor, White Label, Equipment, Vehicle, or Venue)
3. Fill in contact details — email, phone, role or position
4. Set the status and optionally link to an Account or Contact
5. Switch to the **Rates** tab to enter hourly or day rates
6. For Equipment or Vehicle types, use the **Equipment** tab to log serial number, purchase date, condition, and quantity
7. Pick a calendar color at the bottom, then click **Save Resource**

Find a Resource

- Use the search bar to find by name, email, phone, role, or notes
- Use the **All / People / Equipment / Venues** buttons to narrow by category
- Use the filter dropdowns to refine by type, status, or equipment condition

Edit or Delete

- Click the **Edit** button on any row to update details
- Click **Delete** on a row to remove a single resource
- Select multiple resources with the checkboxes and use **Delete Selected** for bulk removal

Tips

- Link resources to your existing Contacts and Accounts to keep everything connected
- The **Assignments** column shows how often a resource is in use — great for spotting overbooked team members or equipment
- Use the **On Leave** status instead of deleting people who are temporarily unavailable
- Assign distinct calendar colors to resources so they stand out when scheduling projects and appointments