Managing the Resource Library
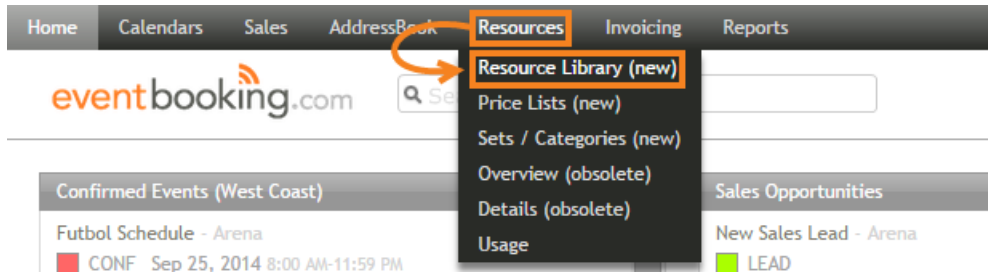
Updated: September 28, 2014

This document will walk you through:

Navigating to the Resource Library

1. Hover over **Resources**.
2. Click **Resource Library (new)**.

Selecting a Resource Library View

There are three ways to view the resource library:

1. Click **Info** to view basic information about the resource items.

2. Click **Pricing** to view the cost and price of each resource. For more on managing prices, please see the full article.

3. Click **Multipliers** to view discounts, service charges and taxes that have been applied to each resource. For more on these multipliers, please see the full article.

Filtering Resources

There are three ways to filter resources:

1. The status drop-down allows you to select whether you would like to view active and archived resources, only active resources or only archived resources.
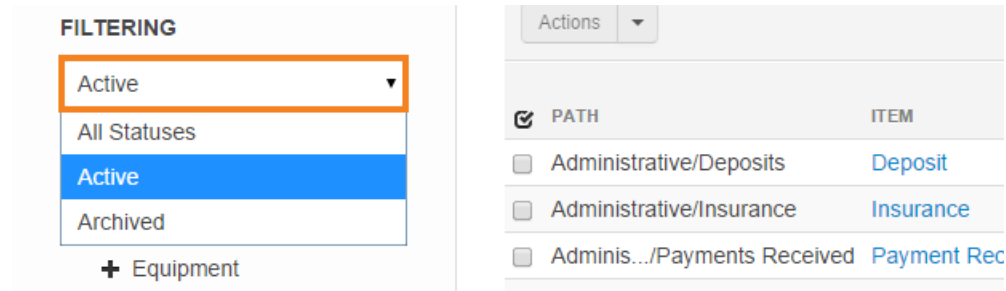
2.   The sets and categories hierarchy has the following options:

- **All** displays all resources in the library.

- **Expand** expands the entire hierarchy, making all sets and categories visible.

- **Collapse** collapses the entire hierarchy, making only sets visible.

- **Manage** opens the sets and categories page. For more information, please see the full article.

- You can also click a single set or category to show only the resources in that set or category. Clicking the plus signs will expand that section of the hierarchy to show any categories underneath.

3. The resource search allows you to type in a word or phrase and filter out any resources that do not match.

- The magnifying glass icon will search for your word or phrase. You can also simply press **Enter** on your keyboard.

- The X icon will clear the search field.

- The gear icon will bring up the search options window.

INFO VIEW

All Sets and Categories

| Beer | 🔍 | ✖ | ⚙ |

| Actions ▼ |

	PATH	ITEM	QUANTITY	STOCK TYPE	STATUS	GL ACCOUN
☐	Food and Beverage/Alcohol	Beer, domestic bottle	0	Unlimited	Active	
☐	Food and Beverage/Alcohol	Beer, import bottle	0	Unlimited	Active	
☐	Food and Beverage/Alcohol	Beer, Keg	0	Unlimited	Active	

The resource library will display fifty resources at once. If there are more than fifty resources that meet your criteria, you will be able to click **Next** and **Previous** to navigate between the pages of results.

INFO VIEW

All Sets and Categories

| Search | 🔍 | ✖ | ⚙ |

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Actions ▼

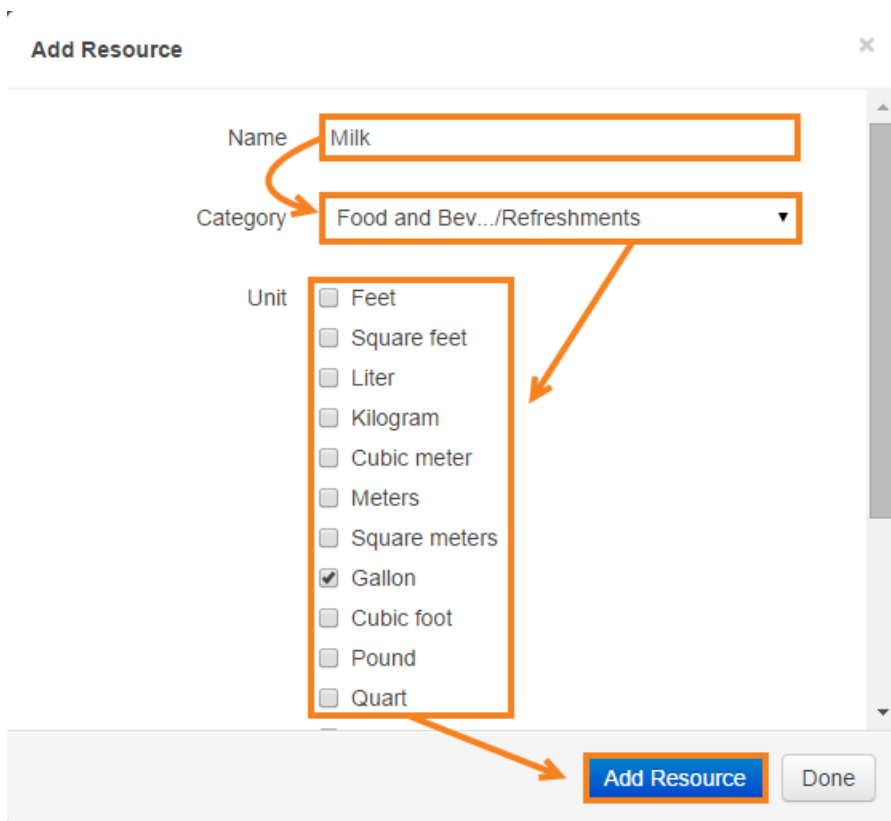| ☑	PATH	ITEM	QUANTITY	STOCK TYPE
☐	Administrative/Deposits	Deposit	0	Unlimited
☐	Administrative/Insurance	Insurance	0	Unlimited
☐	Adminis.../Payments Received	Payment Received	0	Unlimited
☐	Administrative/Shipping	Shipping	0	Unlimited
☐	Audio Visual/PA Systems	1000W Stereo w/ Mic	4	Limited - durable

Adding Resource Items

1. Click **Add Resource** in the upper-right corner.

2. Type the desired name of your resource item.
3. Select the category your resource should be under.
4. Check the units by which your resource will be measured. For more information on inventory units, please read the full article.
5. Click **Add Resource** or press **Enter**.

6. If you would like to add another resource, enter the needed information and click **Add Another Resource** or press **Enter**.

7. When you are done adding resources, click **Done**.

Editing Resources

1. Click **Edit** in the upper-right corner of the resource list.

2. Use **Tab** or the arrow keys to move between the fields, entering or selecting the proper information.
3. Click **Save** to save your changes or **Cancel** to cancel all of the changes you've made.

Moving Resources

1. Check the resource items you would like to change or click the checkbox icon to check all the items.

2. Click **Actions**.
3. Click **Move**.
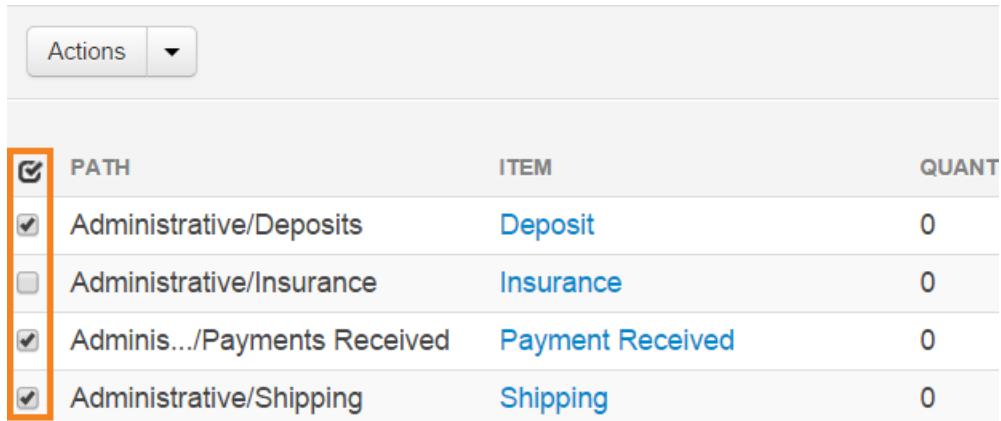
4. Use the drop-down to select the category to which you would like to move the resource item(s).

5. Click **Move**.

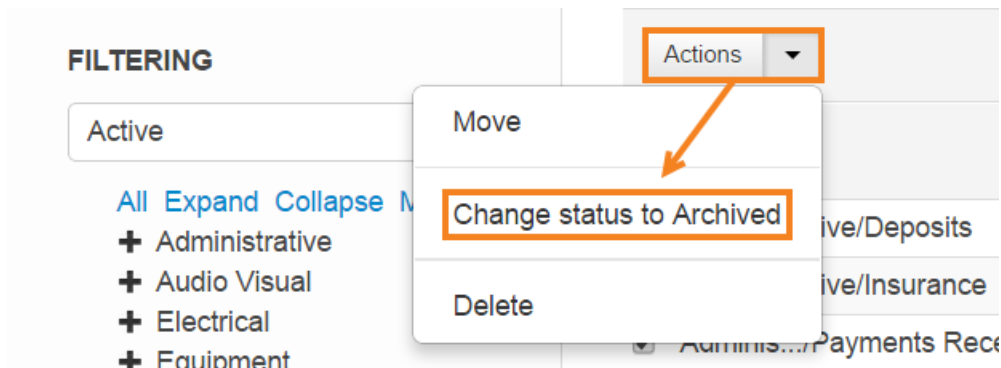**Move Resources**   ✕

Category   Administrative/Deposits   ▾

Move   Close

Archiving Resources

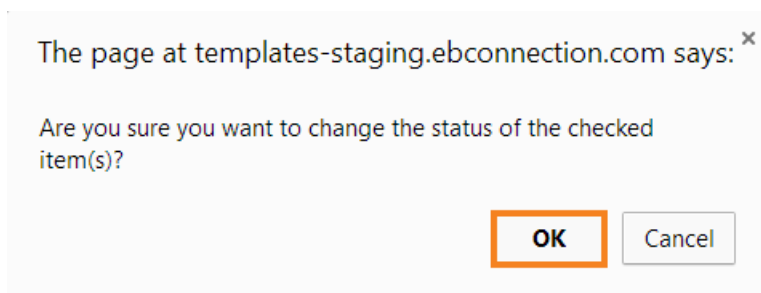1. Check the resource items you would like to change or click the checkbox icon to check all the items.

2. Click **Actions**.
3. Click **Change status to Archived**.

4. Click **OK** to confirm that the checked items should be archived.

Deleting Resources

1. Check the resource items you would like to delete or click the checkbox icon to check all the items.

2. Click **Actions**.
3. Click **Delete**.

4. Click **OK** to confirm that the checked items should be deleted completely.

If any of the resource items you selected are currently in use, an alert will prevent you from deleting them. You will need to deselect any in-use resources in order to delete the rest.