

SECTION 10

Resources

The people and things your work runs on.

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Resources

Resources is where the people, organizations and things your work runs on live: contacts, organizations, materials, equipment, costs and subscriptions. Add them once, then pull them onto tasks, projects and programs, where their costs add up and their stock counts itself.

It also holds any Smart List you've turned into a section, and the groups you file things into. Everything you'd otherwise keep in six spreadsheets and one person's head.

Open it from **Resources** in the left menu. It comes with every plan. On Free, the six sections hold 50 records between them and the workspace can have 2 groups.

IN THIS GUIDE

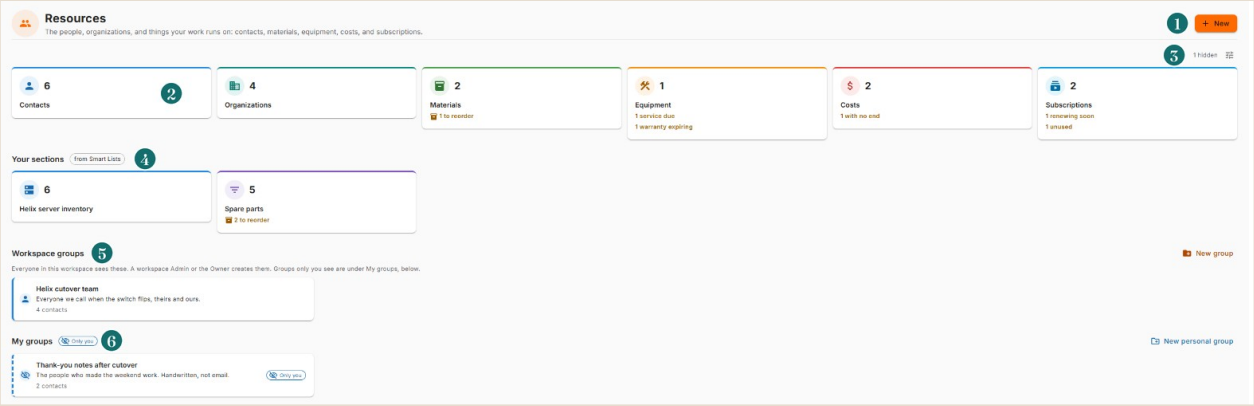
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Three questions Resources answers

QUICK START

1. **Who and what do we have?** One place for every contact, supplier, part, tool, bill and subscription.
2. **What needs attention?** Equipment due for service, subscriptions about to renew, parts to reorder. Resources tells you before they become a surprise.
3. **What is this work using?** Link resources to a task, project or program and you can see what it costs and what it has taken off the shelf.

The lay of the land



The Resources page, with the main areas numbered

1. **New.** Start a new record in any of the six sections.
2. **The six sections**, each with how many records you can see, plus anything that needs attention.
3. **Arrange sections**, to reorder or hide them.
4. **Your sections:** Smart Lists you've turned into sections.
5. **Workspace groups**, which everyone sees.
6. **My groups**, which only you see.

When you delete a section made from a Smart List, a **Recently deleted sections** panel appears here too. More on that below.

The six sections

SECTION	WHAT GOES IN IT
Contacts	People: your team, the client's team, the vendor who always picks up. A contact can carry an hourly cost
Organizations	Companies: clients, suppliers, manufacturers, vendors
Materials	Things you use up: cable, parts, consumables. On Pro, each has a stock card
Equipment	Things you use and keep: test kits, laptops, a van. Service dates and warranty live here
Costs	Money going out: travel, a one-off purchase, a weekly expense
Subscriptions	Money going out on repeat: software seats, cloud services, licences

> **TIP**
>
> Organizations are the glue. A contact's **Employer**, a material's **Supplier**, equipment's **Manufacturer**, a cost's **Vendor** and a subscription's **Provider** all point at an organization, so you type a company once.

Needs attention

The links under a section's tile, like **1 service due** or **2 to reorder**, are Nexus doing the remembering. Click one and the section opens filtered to just those records. The same words show as a chip on the record itself.

SECTION	FLAG	WHEN
Materials	**to reorder**	Available stock is at or under the reorder point (Pro)
Materials	**to order**	Upcoming work needs more than is available, and the lead time says order now
Equipment	**service due**	The next service is in the next 14 days

SECTION	FLAG	WHEN
Equipment	**service overdue**	The next service date has passed
Equipment	**warranty expiring**	The warranty ends in the next 30 days
Equipment	**unavailable but committed**	Marked unavailable, but still on open work
Subscriptions	**renewing soon**	It renews automatically in the next 14 days
Subscriptions	**unused**	Active and auto-renewing, but no task, project or program uses it
Costs	**with no end**	It repeats with no number of occurrences, so it never stops
Contacts	**inactive but assigned**	Marked inactive, but still holding open work
Contacts	**with no rate**	On an open project with no hourly cost, so their time adds nothing to its cost

Service overdue, unavailable but committed, and inactive but assigned show in red. The rest are amber. Organizations never need attention. They're organizations.

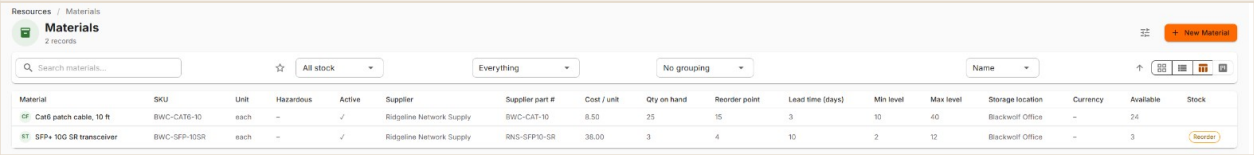
Arranging the page

The tune icon above the tiles opens **Arrange sections**. Use the arrows to reorder, and the eye to hide a section you never use. A hidden section is still there; it just stays off this page. **Reset** puts everything back.

> **NOTE**
>
> This is just for you, on this browser. Use a different computer and you'll see the usual order.

A section's list

Click a tile to open the section.



The Materials list

- **Search** looks through the main fields: names, email, job title, SKU, category and so on. It doesn't search custom fields.
- **The star** shows only the records you've starred. Stars are yours alone.
- **Stock** (Materials, on Pro): *All stock*, *Needs reorder*, *Below minimum*, *Negative* or *Over maximum*. *Needs reorder* catches the first three together.
- **Everything** narrows to one of the section's needs-attention flags.
- **Group by** lists records under the organization they point at: *Group by employer*, *supplier*, *manufacturer*, *vendor* or *provider*. **Only these** beside a heading keeps just that group.
- **Sort** by **Name**, **Created** or **Modified**, with the arrow for the direction.
- **Cards**, **List**, **Grid** or **Kanban.**

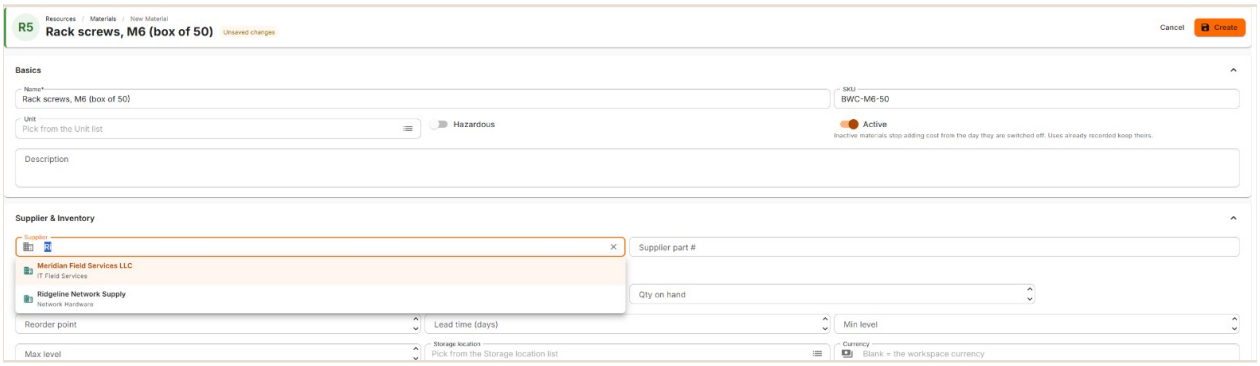
Every filter you set shows as a chip under the toolbar, with **Clear all** to start over. Long sections show 24 records a page.

The views

- **Cards** and **List** show each record's name and its most useful details.
- **Grid** shows a column for every field on the form. On Materials it adds **Available** and **Stock**, and on Costs a **Total** at the bottom, per currency.
- **Kanban** is a board with one column per option of a dropdown field. Drag a card to another column to change the value. A workspace Admin sets it up in **Customize** (below), by making Kanban the default view and choosing the field for its columns. Until then the button is greyed out.

Adding a record

Click **New** on the Resources page, or **New Material** (or Contact, and so on) on a section's list. Fill in the form and click **Create**. The record opens, ready for the rest.



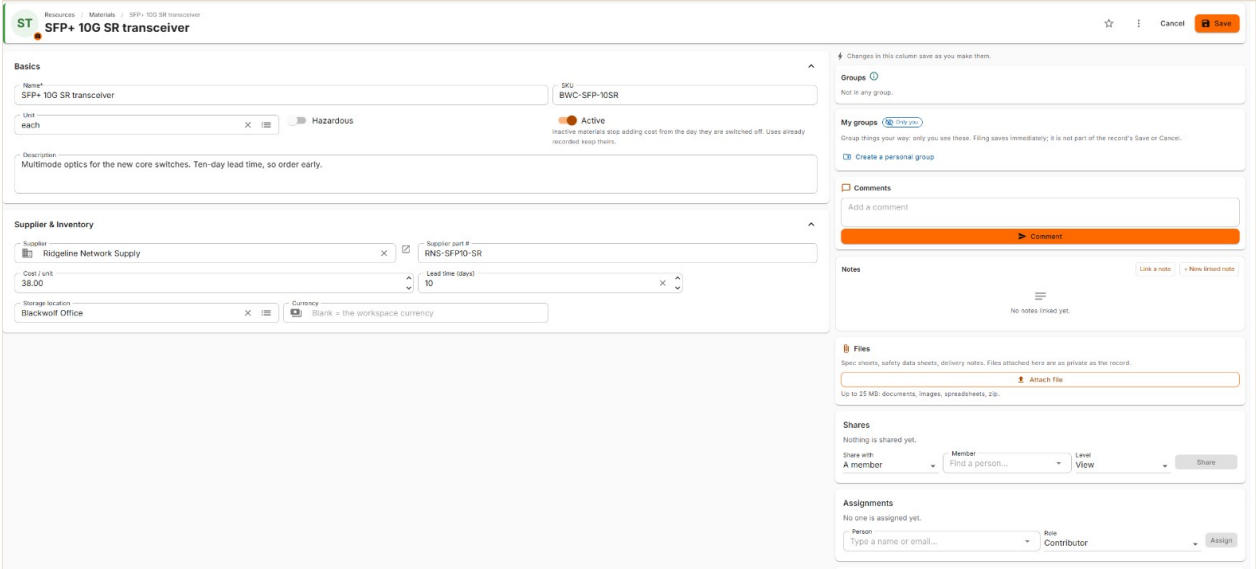
A new material

- **Required fields** carry an asterisk: a contact's **First name** and **Last name**, a cost's **Name** and **Amount**, a subscription's **Service**, and every other section's **Name**.
- **Lists the workspace keeps**, like Department, Industry, Unit, Category and Location, say *Pick from the … list*. Pick a value. An Admin or the Owner can type a new one and choose **Add "…" to the list**; everyone else asks an admin. It keeps "Laptop", "laptop" and "LAPTOP" from becoming three things.
- **Organization fields** search as you type. Can't find it? **Add "…" as a new organization** creates it on the spot. The **Open** icon beside the field jumps to it.
- **Organization names are unique.** Try to add a second "Helix Dynamics" and Nexus points you to the first one.

Is this the same person?

When you create a contact with the same email, or the same first and last name, as one you can see, Nexus asks **Is this the same person?** and shows the match. **Use existing** opens that one instead. **Create anyway** goes ahead. **Back** returns you to the form.

A record's page



A material's page

At the top: the photo (click it to change it, up to 25 MB), the name, any needs-attention chips, the **star**, the ⋮ menu, **Cancel** and **Save**.

The form is on the left. Change it and click **Save**. Sections like *Address* start folded; click a heading to open it.

The right-hand column saves as you go. No Save needed there.

Saving

- Leave with unsaved changes and Nexus asks first: **Keep editing**, **Discard changes**, or **Save and close**.
- If someone else saved the record while you were editing, Save stops and says who changed what, with **Reload**. Nothing gets overwritten. Your typing stays on screen until you reload, so copy anything you want to keep.
- A field with a problem says so in red underneath, as you type: an email without an @, a phone number with letters in it.

The right-hand column

CARD	WHAT IT DOES
Groups	Which workspace groups the record is in. **Add to group**, or the × on a group to take it out
My groups	Your personal groups. Tick one to file the record there
Comments	Quick notes on the record. Pin one to the top, edit or delete your own
Notes	Pages from Notes linked to this record. **Link a note** or **+ New linked note**
Files	Spec sheets, invoices, warranties. Up to 25 MB each: documents, images, spreadsheets, zip
Shares	Who else can see it, and at what level
Assignments	People with a role on the record: Owner, Contributor, Reviewer or Observer
Stock	Materials on Pro. See *Stock*, below
Used in	The tasks, projects and programs this record is linked to
Record	When it was created and last modified

An organization also has **Linked records**: every contact, material, piece of equipment, cost and subscription that names it, with **View all** to open them in their section.

What's different about contacts

Contacts are people, so they get a little extra care.

- **Who changes what.** On a teammate's card, their name, email, title, department and employer are kept by HR and the workspace Admin. Their address, phones, birthday and cost are seen and changed only by them, their manager and HR. Everyone else sees the basics.
- **Preferences, Web & Social and Family** are marked **Only you**. They're your own notes about the person: their nickname, their coffee order, their kids' names. Nobody else sees them, not even the person.
- **Yours** shares those notes with a member or a group, when you want to. *Shared with nobody. Only you see it* until you do.
- **Family**: turn on **Has spouse** or **Has children**, then **Add spouse** or **Add child**.
- **Availability & Cost**: **Max hours / day** and **Cost / hour** drive planned hours and project cost. Hours already logged keep the rate they were logged at.
- **Active**: off means they've left. They stay on the org chart and on work already assigned, drop out of assignee pickers, and HR is asked to give their reports a new manager.

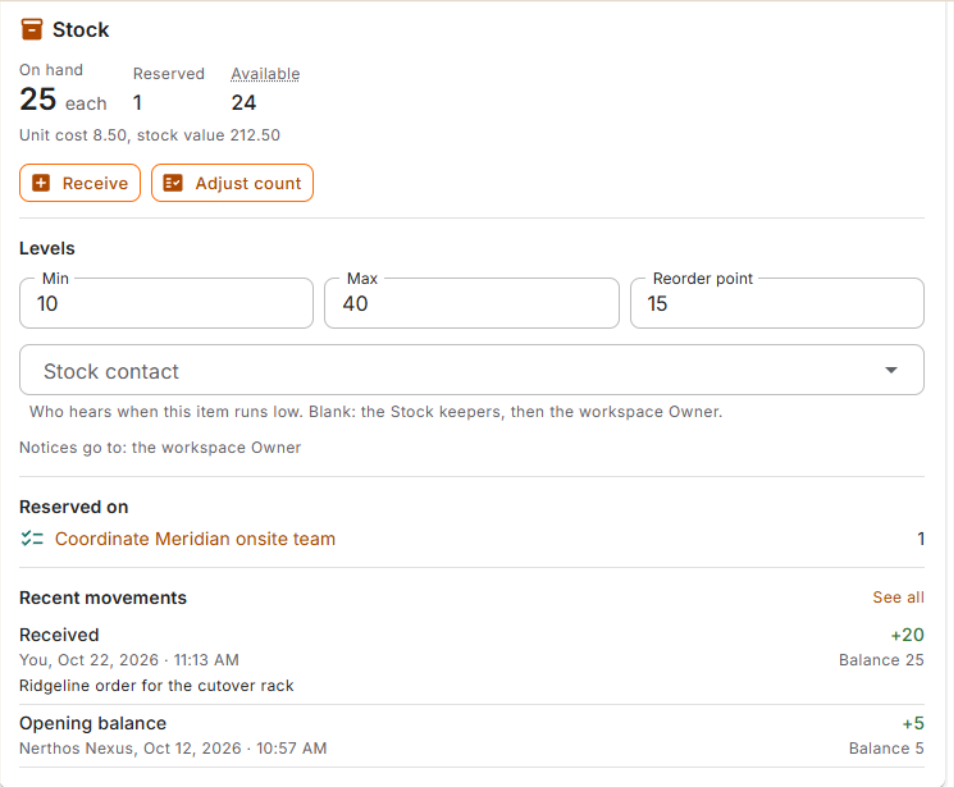
- **Resource DNA** opens their skills profile. It comes with the Enterprise plan.
- **Reporting** shows who they report to and who reports to them, with **Open in org chart**. HR and their manager can **Change manager**.
- **Your own card** says **Me**. **Share your team up** lets you share your reports' time and growth with your own manager, for a window you choose.

What's different about the others

- **Organizations** can be promoted to a client account (**Promote to client account**) on the Enterprise plan.
- **Equipment** keeps **Last service**, **Next service**, **Warranty expires**, a **Flat rate** and a **Cost / hour**.
- **Costs** and **Subscriptions** can repeat. Turn on **Recurring**, then set **every** how many **Day**, **Week**, **Month** or **Year**, and how many **Occurrences** (blank means no end). A line underneath reads it back: *Every 1 week, with no end, from Oct 24, 2026.*
- **Subscriptions** have **Auto-renews**. Off means it ends at its renewal date instead of repeating.
- **Inactive** materials and subscriptions stop adding cost from the day they're switched off. What was already used keeps its cost.

Stock

On Pro, every material gets a **Stock** card, and so does every row of a Smart List section you choose to track. The one rule behind it: **nobody types the on-hand number.** Every change is a movement with a reason, a person and a time, and the count is what they add up to. That's why you can trust it.



A material's stock card

Three numbers

NUMBER	WHAT IT MEANS
On hand	What is physically on the shelf
Reserved	What open work has claimed but not used yet
Available	On hand minus Reserved: what's free to promise

The first time a material's card opens, its old *Qty on hand* becomes the opening balance. From then on the card owns On hand, Min, Max and Reorder point, and the material's form stops showing them, so there's only one place to change them.

Receive

For when the delivery shows up. Click **Receive**, enter the **Quantity received**, and optionally a **Unit cost** and a **Note**. Nexus shows the result before you commit: *On hand goes from 5 to 25 (+20).* A unit cost you enter becomes the item's cost per unit from then on. Leave it blank to keep the current one.

Adjust count

For when the shelf and the screen disagree. (The shelf is right.) Click **Adjust count**, enter what you **Counted**, and pick a **Reason**: Count, Damaged, Lost, Found or Other. Nexus records the difference, so the history still adds up. **Save count** waits until the count actually differs from On hand.

Levels

Set **Min**, **Max** and **Reorder point**, and choose a **Stock contact**: the person who hears when this item runs low. Leave it blank and notices go to everyone with the **Stock keeper** role, and if nobody has it, to the workspace Owner. **Save levels** keeps them.

A level can't be negative, and Min can't sit above Max.

Reserved on, and recent movements

Reserved on lists the work that has claimed this item, and how much. **Recent movements** shows the latest changes, each with who, when and the balance after. **See all** opens the full history in the **Stock movements** report.

Who can change stock

Anyone who can see an item can see its stock. To receive, adjust or set levels you need one of these: Edit on the item, the **Stock keeper** role, to have created the item, or to be the workspace Owner.

Flags and notices

FLAG	WHEN IT SHOWS	NOTICE SENT?
Negative	On hand is below zero	Yes
Below minimum	On hand is under Min	Yes
Reorder	Available is at or under the Reorder point	Yes
Over maximum	On hand is over Max	No, it's just a flag

> **NOTE**
>
> Reorder looks at Available, not On hand, because stock already promised to work isn't really yours to count.

A notice goes out once, when an item crosses the line. It doesn't go again until the item has recovered and crossed again, and when it recovers the old notice is taken back. Helpful, not naggy.

Stock that moves with the work

This is the part that does the bookkeeping for you.

- **Link** a material to a task, project or program with a quantity, and that quantity is **Reserved**.
- **Complete** the work and Nexus asks **Confirm materials used**, with the planned amounts filled in. Change any that differ from the plan, then click **Complete**. The stock comes off the shelf.
- **Reopen** the work and what was used goes back to Reserved. **Cancel** it, or move it to the bin, and its reservations are released.
- Not enough on the shelf? Nexus warns you and lets you go ahead anyway. Work shouldn't wait on a spreadsheet.
- When an automation or an import completes the work, Nexus uses the planned amounts and marks them *Not confirmed*. Anyone who can edit the work can correct the amount used on its Resources panel.
- A material reserved on open work can't be deleted until that work is completed or released.

On other plans

Below Pro, materials keep their plain *Qty on hand* and level fields, and there are no stock cards. A workspace that drops below Pro keeps its counts, frozen: *Stock is frozen. Counts are kept but cannot change on this plan.*

Groups

A section always shows everything. A group is a smaller list inside it: a Contacts group called *Helix cutover team*, a Materials group per job site. A record can be in as many groups as you like.

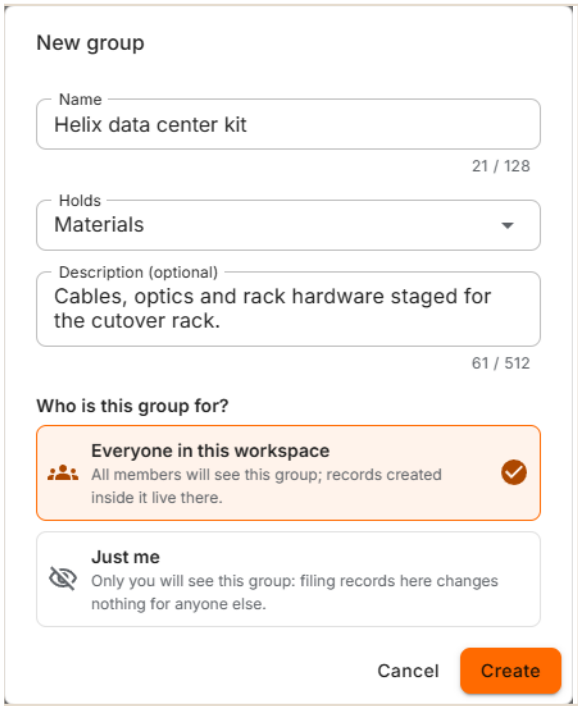
There are two kinds.

	WORKSPACE GROUPS	MY GROUPS
Who sees it	Everyone in the workspace	Only you
Who creates it	A workspace Admin or the Owner	Anyone
Who files records in it	Whoever created it, an Admin or the Owner, and they need Edit on the record	You, for any record you can see
On Free	Up to 2	As many as you like

Filing a record in a personal group never changes the record for anyone else. It's your private filing.

Making a group

Click **New group** (or **New personal group**) on the Resources page. Give it a **Name**, choose what it **Holds** (Contacts, Materials and so on), and add a **Description** if you like. Admins also choose **Who is this group for?**: *Everyone in this workspace* or *Just me*. Click **Create** and the group opens.



The New group dialog

Putting records in a group

- From the group's page, **Add existing** finds records by name. Tick them and click **Add**.

- From the group's page, **New Contact** (and so on) creates a record that starts life in the group.
- From any record, the **Groups** and **My groups** cards on the right. These save straight away, separate from the record's Save.

To take one out, use **Remove from this group** on its ⋮, or the ✕ on its Groups card. The record itself stays exactly as it is.

A group's own form

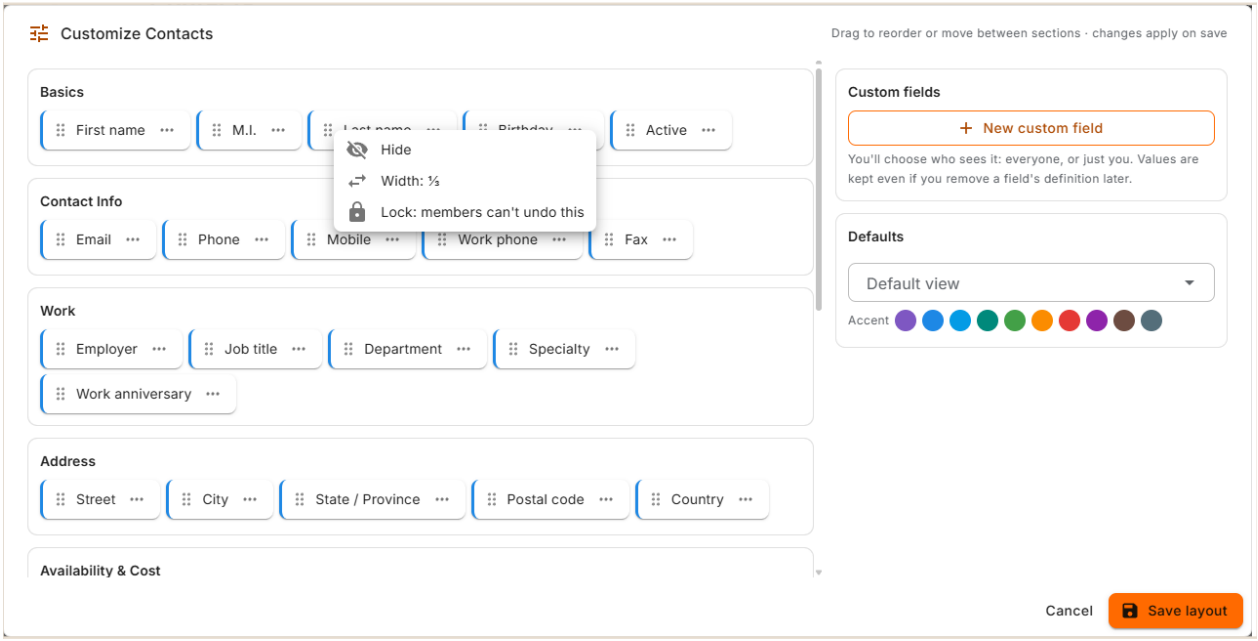
A workspace group can have its own fields (see *Customize*, below). When a record is in more than one group with its own fields, its Groups card marks which group's form it uses, and **Use another group's form** switches.

Renaming and deleting

> **HEADS UP**
>
> A group's ⋮ has **Rename group** and **Delete group**. Deleting asks first, and tells you how many records leave the group and where the group is linked to work. Only the group goes. Every record in it stays. A deleted group can't be brought back, so read the box.

Customize: make a section yours

The tune icon on a section's list opens **Customize**. What you can do depends on who you are.



Customize

Everyone can personalize a section for themselves: hide fields they never use, drag fields into a different order, change a field's width, and add custom fields only they can see. *Changes here apply only to you, no one else will notice a thing.*

A workspace Admin or the Owner changes the section for everyone, and can still make "just me" changes. When an admin hides or shows a field, Nexus asks **Who is this change for?** An admin can also **Lock** a field so members can't change it for themselves.

Custom fields

New custom field adds a field of your own. Pick a **Label**, a **Type** and the section of the form to **Place** it in, and whether it's **Required**.

The types are Text, Long text, Number, Currency, Date, Checkbox, Dropdown (options), Web link and Link to a record. The type can't be changed later.

- Members' new fields are theirs alone.
- An admin chooses **Who should see this field?**: everyone, or just them.
- Making an existing field required, when some records are missing it, asks whether to require it for **every record** or **new records only**.
- **Remove field** takes it off the form. The values stay stored, so adding it back brings them back.

Defaults

- **Default view**: the view the section opens in. Admins only.
- **Kanban columns from**: the dropdown field that makes the Kanban columns, when the default view is Kanban.
- **Accent**: the section's colour. Admins only.

Click **Save layout** (or **Save my layout**). **Reset to workspace layout** clears all your personal changes to the section and goes back to the workspace's.

Opened from a workspace group's page, Customize changes the form for that group only.

Your sections (from Smart Lists)

When a Smart List grows up, you can turn it into a section, and it appears on the Resources page under **Your sections**. Its records open like any other resource, with the right-hand column, comments and files.

A few things are different:

- Its columns are designed in the Smart List designer, so **Customize** is personal only.
- It has **Export**, to an Excel workbook or a CSV file, keeping your current search, sort and star filter.
- Its ⋮ has **Section settings...** (name, description, the name for one item, colour and icon), **Track stock...** and **Delete section**.
- It doesn't have groups, Group by or needs-attention flags.

Tracking stock in a section

Track stock... turns a section into an inventory, on Pro. Choose which Number column is **On hand** (or **Add an On hand column**), and optionally **Min level**, **Max level**, **Reorder point** and **Unit cost**. Each row then gets a stock card just like a material, and a row with a unit cost adds its cost to the work that uses it.

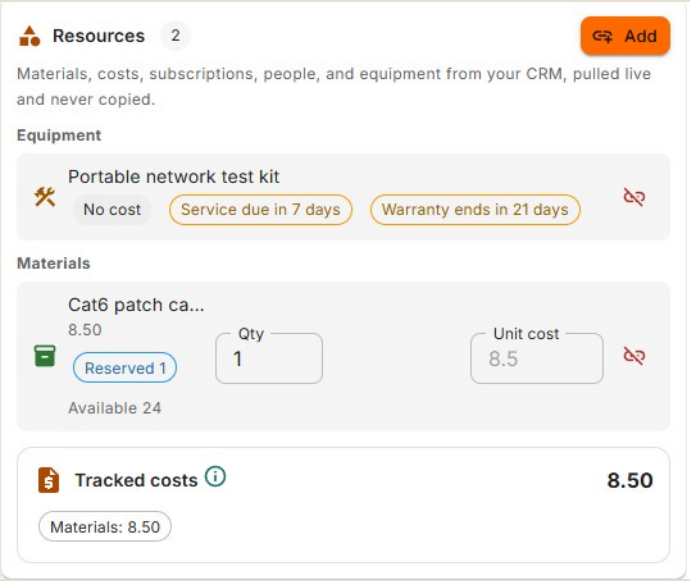
Turning it off writes each row's last count back into its On hand column. The history is kept.

Deleting a section

Delete section moves the section and its records to **Recently deleted sections** on the Resources page. **Restore** brings it back as a section, with its records. After the workspace's retention period (30 days unless your workspace says otherwise), it's deleted for good. A section that tracks stock can't be deleted until Track stock is turned off.

Resources on your work

Tasks, projects and programs each have a **Resources** panel. This is where resources earn their keep.



The Resources panel on a task

Click **Add** to open the picker:

1. **Choose sources**: the sections, groups and Smart List sections you want to pick from. Nexus remembers your choice for that piece of work.
2. **Pick**: search, then **Add** what you need. Materials and stocked rows take a quantity. Can't find it? Type a name and **Create & link** makes a new one on the spot.
3. **Purpose (optional)** says why it's there, and **Done** closes the picker.

A whole group can be linked too. It stays live: anyone added to the group later shows up on the work as well. Linking a whole group never reserves stock.

On the panel:

- **Materials, costs and subscriptions** show their cost, and on Pro the **Tracked costs** total adds them up for the work. A recurring cost only counts the times it falls between the work's start and end.
- **People and equipment** say **No cost**. Their cost comes from the roster and the hours, not from being linked.
- **Stock items** show what's reserved and what's available, or *Short by* how many.

- The remove icon on a line takes it off the work. The record itself is untouched. Once a material has been used, the link stays, so the history adds up.

Adding resources to work comes with the Pro plan. Links already there stay readable on any plan.

Who can see a record

A record is seen by whoever created it and anyone it's **shared** with.

- **Shares** gives a member, a group, or (for a configuration Admin) the **Whole workspace** one of four levels: **View**, **Comment**, **Edit** or **Admin**. Only someone with Admin on the record can share it.
- **Publish to workspace** on the ⋮ lets everyone read it. That's a configuration Admin's call.
- **A teammate's card** isn't shared at all. Everyone in the workspace sees their name, title and department; the rest belongs to them, their manager and HR.

When you can see a record but not change it, the page says *You can view this record. Ask its owner for Edit to change it.*

Deleting and bringing back

⋮ → **Delete** asks first. It tells you where the record is used (*used on 2 tasks and 1 project*), what will happen there while it's deleted, and how long the recycle bin keeps it. Then it's in the **recycle bin**, ready to restore.

Some records won't go, and Nexus says why:

- **A teammate's card**, while they're a member.
- **A contact who manages people**, until their reports have a new manager. Nexus offers to move them up a level for you.
- **An organization** that is a client account's client or a contract's counterparty.
- **A material** reserved on open work.

Common questions

Why can't I find a record I know exists?

> It may not be shared with you. Resources only shows what you can see, and the counts on the Resources page are your counts.

Why can't I type a new Department (or Unit, or Category)?

> Those lists are kept by the workspace, so they stay tidy. Pick from the list, or ask an Admin to add your value.

Why does my teammate's card say I can't change their title?

> Names, titles and departments are kept by HR and the workspace Admin. Ask them.

Who else sees my notes about a contact?

> Nobody. Preferences, Web & Social and Family are yours alone until you share them from **Yours**.

Why is the Kanban button greyed out?

> The section needs a dropdown custom field and an admin to set Kanban as its default view in Customize.

Why does a person on my task say No cost?

> People and equipment cost what their hours cost, through the roster. Linking them doesn't add a second charge.

Why can't I type On hand?

> Because then nobody could say why it changed. Use **Receive** for deliveries and **Adjust count** for everything else.

On hand is negative. Is something broken?

> No. Work was completed with more than the shelf held. Nexus lets that happen rather than block the job, and flags it so someone counts.

Why can't I delete this material?

> It's reserved on open work. Complete or release the work first.

I deleted a group by mistake.

> The records are all still there; only the group went. Groups can't be restored, so make it again and add them back.

