Appvibe Budget Tracking Board

Overview of Features

Key Features

Appvibe Budget Tracking Board offers comprehensive capabilities for tracking budget allocations, spending, and approvals. This Jira app assists teams by providing real-time financial visibility, ensuring projects remain within budget and highlighting any deviations early.

Incorporating customer feedback is vital for adjusting budget line items efficiently. By understanding customer needs and priorities, teams can reallocate resources to meet demands without overspending, enhancing project outcomes and customer satisfaction.

- **Feedback Submission**: Capture feedback seamlessly through Jira issues and dedicated forms, ensuring no input is lost.
- **Organized Views**: Employ tags, filters, and saved views to efficiently sort and prioritize feedback.
- **Direct Jira Integration**: Link customer feedback directly to Jira issues for actionable follow-ups and streamlined processes.
- **Customizable Layout**: Adapt the app by adding, removing, or rearranging columns to meet your team's specific feedback tracking requirements.
- **Activity History**: Keep a clear record of actions and updates on each feedback record, maintaining transparency and accountability.

Conclusively, Appvibe Budget Tracking Board transforms the way teams manage their finances and customer interactions. By integrating customer feedback into budget tracking, teams can ensure projects are not only on budget but also aligned with client expectations.

Getting Started

Installation

Budget Tracking Board is a Jira app designed to streamline financial management within your projects. Follow the steps below to install and enable the app for your Jira instance.

Step 1:

Log in to Jira with your Admin credentials to access installation and configuration settings.

Step 2:

Open the Atlassian Marketplace. In Jira, navigate to the menu and click on Apps → Explore more apps to access the Marketplace.

Step 3:

Search for the app using the search bar: **Appvibe Budget Tracking Board**.

Step 4:

Install the App. Click on Get app or Try it free to initiate the installation. Confirm and grant any necessary permissions during the installation process.

Step 5:

After installation, navigate to Manage Apps in the Admin section to verify that the app is enabled.

Once the Budget Tracking Board is successfully installed and enabled, you can find it under the Apps section in the menu on the left side of your Jira screen. This convenient placement allows users to easily incorporate budget management into their existing workflows.

Configuration

Setup and Customization

Navigate to the configuration and setup of the Appvibe Budget Tracking Board by going to **Manage Apps** in your Jira instance. Locate the app and click the **Configuration** button. This will take you to the configuration page, where you can manage roles and permissions, view system fields, set up custom fields, and configure conditional formatting.

Roles and Permissions

The Appvibe Budget Tracking Board app provides three distinct roles:

1. **Admin**: This super role grants full access to all configurations and data management, including setup. By default, Jira Administrators have access to this configuration screen and can assign roles to Jira groups.
2. **Editor**: Users with this role can update and view all Budget Tracking Board data, offering comprehensive interaction with the board.
3. **Viewer**: This role enables users to view the Budget Tracking Board data without permissions to make any updates.

Administrators are responsible for assigning these roles to appropriate Jira user groups.

System Fields

Predefined system fields in the Budget Tracking Board are essential for budget management. These fields include:

- **Budget Category**
- **Allocated Amount**
- **Spent Amount**
- **Approval Status**
- **Project**
- **Department**
- **Tags**

These fields form the foundational dataset required for efficient budget tracking.

Custom Fields

To accommodate additional data requirements, you can define custom fields:

- Click the **Add Field** button to create a new field.
- Configure options such as:
  - **Field Key**: A unique key identifier.
  - **Field Label**: The label associated with the key.
  - **Field Type**: Choose data types like Text, Number, Date, Select, or Multi-Select.
  - **Required**: Determine if this field is mandatory for data entry.
  - **Sortable**: Decide if data in this field can be sorted.
  - **Filterable**: Enable filtering capabilities for this field.

Conditional Formatting

Conditional formatting allows you to visually distinguish data based on specific criteria:

- Set conditions based on field values.
- Modify labels and highlight colors when conditions are met, enhancing clarity and focus on key data points.

Summary

The Appvibe Budget Tracking Board app offers robust configuration options that empower Jira administrators to tailor the budget tracking process efficiently. With well-defined roles, essential system fields, customizable data options, and dynamic formatting, project managers and developers can effectively manage and visualize budgetary data.

Working With Records

Adding and Viewing Records

Adding Records to the Budget Tracking Board app within Jira simplifies how records are managed for system, project, or Jira Issue levels. With a few clicks, you can input critical budget details and stay informed about your financial allocations, ensuring streamlined project management.

You can add records with detailed and precise fields. Among these are the Budget Category, Allocated Amount, Spent Amount, Approval Status, Project, and Department. Additionally, you can include any custom fields you have configured. Tags can also be incorporated to enhance the specificity of the records.

Upon navigating to the Budget dashboard page, start by clicking the Create button. Here, you'll be prompted to enter data across all reflected fields: Budget Category, Allocated Amount, Spent Amount, Approval Status, Project, Department, and any custom fields or tags. Once saved, these records will be accessible for viewing on the Budget dashboard.

1. **Create and Manage Multiple Views**
   Easily personalize your reporting by selecting the View dropdown at the dashboard's top. Options here include creating new views, managing existing ones, or clearing them. Note that changes to views require admin role permissions.
2. **Filter by a Column Value**
   Narrow down your data by using the filtering option available on columns with filter capabilities. Simply click the column title icon and input your criteria.
3. **Sort by a Column Value**
   Organize your records by clicking on any column title and double-clicking to sort. You can choose between ascending or descending order to refine your data presentation.
4. **View Activity History**
   Track all user activity that impacts data by accessing the Activity History. This feature is located by clicking the three-dot menu in the top right corner of the dashboard.

The Budget Tracking Board app helps maintain financial oversight through efficient record-keeping and customizability. By managing records and views effectively, users ensure precise tracking and insightful budget analytics within Jira.

FAQ

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What is the object and purpose of this app?

The purpose of the app is for Budget Line Item tracking. It is designed to track budget allocations, spending, and approvals, providing teams with real-time financial visibility.

What types of feedback can the app track?

The app supports tracking Budget Category, Allocated Amount, Spent Amount, Approval Status, Project, Department. You can also add custom fields for other related fields that you wish to track.

How do I install the app?

You can install the app from the Atlassian Marketplace. Navigate to the Apps section in Jira. Search for the app name Budget Tracking Board. Click Install and follow the prompts.

How do I get support for the app?

Support is available via our support page at https://appvibe.com/support.

Support

Appvibe Support

Overview: We are here to help you. The Appvibe Budget Tracking Board app makes it easy to manage and access budgets within Jira. The app allows a business to track budget allocations, spending, and approvals, providing teams with real-time financial visibility.

Support Contact: If you need further assistance or want to suggest additional features, you can reach us on our Support Page at https://www.appvibe.com/support