

# 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.

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