

Working With Records

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Adding and Viewing Records

Adding records to the Appvibe Client Project Dashboard is straightforward and flexible. Whether you're working at the system, project, or Jira Issue level, the process is designed to be seamless and intuitive. By utilizing this functionality, you can keep all your project data well organized and accessible.

When adding a record, you have the option to populate several predefined fields: Task Name, Client, Due Date, Assigned Team, Progress, and Dependencies. Additionally, you can fill in any custom fields that you've previously defined. To begin creating a new record, navigate to the Client Project Dashboard page and click the "Create" button. Here, you can input the relevant data for each field and enhance your record with tags for further categorization.

1. **Create and Manage Multiple Views**

You can customize how project information is displayed by managing multiple views. By selecting the "View" dropdown at the top of the dashboard, you can create, manage, or clear views to suit your preferences. Note that making changes to views requires admin role permissions.

2. **Filter by a Column Value**

Enhance data accessibility by filtering column values. This feature is available for columns with filtering enabled, and you can activate it by selecting the column title icon and adding your filter criteria.

3. **Sort by a Column Value**

Organize your records efficiently by sorting data within the dashboard. Simply double-click on a column title to sort the records in ascending or descending order.

4. **View Activity History**

Maintain a complete audit trail of all user activities. View detailed modifications by clicking on the three dots located in the top right of the dashboard and selecting "Activity History."

In summary, the Appvibe Client Project Dashboard simplifies the management of project data. By enabling you to add comprehensive records and customize your dashboard views, you can ensure that project information is both accessible and actionable.