

# Appvibe Contract Management

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# Overview of Features

# Key Features

Appvibe Contract Management is an essential tool for project managers and software developers looking to streamline contract tracking within Jira. This app efficiently monitors contracts, deadlines, and renewals while linking each contract to relevant Jira tasks, ensuring comprehensive oversight and management. With Appvibe, contract-related activities are seamlessly integrated into your Jira workflow, optimizing workflow efficiency.

Maximizing customer feedback is invaluable for effective contract management. By capturing client insights, teams can enhance contract negotiation strategies, prioritize client requirements, and deliver tailored solutions. Feedback-driven adjustments can lead to improved contract performance and greater stakeholder satisfaction, aligning contract deliverables with client expectations.

- **Feedback Submission:** Capture feedback seamlessly through Jira issues and dedicated forms, making it easy to track client inputs.
- **Organized Views:** Utilize tags, filters, and saved views to sort and prioritize feedback efficiently, ensuring the most critical information is always at your fingertips.
- **Direct Jira Integration:** Link customer feedback directly to Jira issues, enabling actionable follow-ups and enhancing alignment between client needs and project activities.
- **Customizable Layout:** Add, remove, or rearrange columns to suit your team's feedback tracking needs, providing flexibility and adaptability to varying project requirements.
- **Activity History:** Maintain a clear log of actions and updates made to each feedback record, ensuring transparency and accountability throughout the feedback management process.

In conclusion, Appvibe Contract Management enhances the synergy between contract oversight and project management within Jira, ensuring that every contract and renewal is meticulously tracked. Leveraging customer feedback, teams can refine contract execution, fostering better client relationships and enhancing overall project success.

# Getting Started

# Installation

Contract Management is a Jira app that facilitates efficient administration of business contracts. The following steps will guide you through the installation process so you can start managing contracts directly within Jira.

## Step 1: Log in to Jira with Admin Privileges

Ensure you are logged in with Admin privileges to access all necessary features for app installation and management.

## Step 2: Open the Atlassian Marketplace

In Jira, navigate to the top menu and click on **Apps** → **Explore more apps** to open the Atlassian Marketplace.

## Step 3: Search for Appvibe Contract Management

Utilize the search bar in the Marketplace to search for **Appvibe Contract Management**.

## Step 4: Install the App

Click on **Get app** or **Try it free** to begin the installation. Follow the prompts to confirm the installation and grant any required permissions.

## Step 5: Verify Installation

Once installed, go to **Manage Apps** in the Admin section of Jira to ensure the app is enabled.

Upon successful installation, you will find a link to Contract Management under the **Apps** section in the left-side menu in Jira. Now you can easily access and manage your contracts directly from the platform, streamlining your workflow and increasing project efficiency.

# Configuration

# Setup and Customization

Navigate to the configuration and setup of the Appvibe Contract Management app by going to **Manage Apps** in Jira. Locate the app and click on the **Configuration** button. This will redirect you to the configuration page, where you can set up Roles and Permissions, view System Fields, define Custom Fields, and configure Conditional Formatting.

## Roles and Permissions

The Appvibe Contract Management app supports three roles:

1. **Admin:** A super role with access to all aspects, including configuration and setup.
2. **Editor:** Allows full access to update and view Contract Management data.
3. **Viewer:** Restricted to viewing Contract Management data without update capabilities.

An administrator can assign any of these roles to Jira groups. By default, a Jira Administrator has access to the Contract Management configuration screens.

## System Fields

The app includes predefined Contract Management fields critical for basic functionality. These fields are:

- Contract ID
- Client
- Effective Date
- Expiration Date
- Terms
- Status
- Tags

These base fields ensure you have all necessary data points for efficient contract management.

## Custom Fields

To define additional fields, use the **Add Field** button. This allows you to create a new field with the following options:

- **Field Key:** A unique identifier for the field.
- **Field Label:** A descriptive label for the field.
- **Field Type:** The data type, selected from Text, Number, Date, Select, or Multi-Select.
- **Required:** A flag to specify if the field is mandatory.
- **Sortable:** A flag to enable sorting.
- **Filterable:** A flag to allow filtering.

This flexibility ensures that the app can meet the specific needs of your contract management processes.

## Conditional Formatting

Conditional Formatting permits styling of data based on specified criteria. Set conditions based on field values. If conditions are met, labels and highlight colors can be adjusted to enhance data visibility and interpretation.

## Summary

The configuration and setup of the Appvibe Contract Management app in Jira offer comprehensive tools for managing contract-related data. By setting up roles, leveraging system fields, adding custom fields, and utilizing conditional formatting, you can tailor the app to fit your team's specific requirements effectively.



# Working With Records

# Adding and Viewing Records

Adding Records to Contracts in Appvibe Contract Management is straightforward and efficient. You can add records at different levels, such as the system, project, or Jira Issue level, to ensure comprehensive contract management within your Jira workspace.

You can add records for the following fields: Contract ID, Client, Effective Date, Expiration Date, Terms, Status, as well as any custom fields you have defined beforehand. To add records, navigate to the Contracts dashboard page and click the **Create** button. Enter data for the mandatory fields such as Contract ID, Client, Effective Date, Expiration Date, Terms, Status, and Tags, along with any custom fields pertinent to your needs. Once created, these records will appear in your Contracts dashboard for easy access and management.

1. **Create and Manage Multiple Views**

Create and customize multiple views by selecting the **View** dropdown at the top of the dashboard. You can create a new view, manage existing views, or clear a view. Changes to a view require admin role permissions.

2. **Filter by a Column Value**

Filter records by selecting the column title icon and inputting your filter criteria. Filtering is available only on columns where filtering is enabled.

3. **Sort by a Column Value**

Sort your records by double-clicking the desired column title. This allows you to sort records either in ascending or descending order based on the selected column.

4. **View Activity History**

All modifications made by users are tracked. To view activity history, click the three dots at the top right of the dashboard and select **Activity History** for detailed records.

In summary, the Appvibe Contract Management app integrates seamlessly with Jira, providing a comprehensive solution for managing contracts. With its user-friendly interface, you can efficiently add and manage contract records, while leveraging robust dashboard features for enhanced data management and insight.

# FAQ

# FAQ

**What is the object and purpose of this app?**

The purpose of the app is for Contract Management. It is designed to monitor contracts, deadlines, and renewals, linking each contract to relevant Jira tasks for tracking.

**What types of feedback can the app track?**

The app supports tracking Contracts, including Contract ID, Client, Effective Date, Expiration Date, Terms, and Status. 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 "Contract Management", 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 Contract Management app makes it easy to manage and access contracts within Jira. The app allows a business to monitor contracts, deadlines, and renewals, linking each contract to relevant Jira tasks for tracking.

**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>.