

# 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.

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Revision #1

Created 3 January 2025 03:10:04 by Admin

Updated 3 January 2025 03:10:04 by Admin