

# Working With Records

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# Adding and Viewing Records

Adding Records to the Customer Success Dashboard is a straightforward process that enhances your ability to track and manage customer interactions and statuses within Jira. The app allows you to add records at various levels, including system, project, or Jira Issue level, providing flexibility to suit your project management needs.

When adding a record, you can input data into several predefined fields: Account Name, Health Score, Last Interaction, Onboarding Status, Support Tickets, and Account Manager. Additionally, you can include tags and any custom fields you have defined, tailored to your unique requirements. To begin adding records, navigate to the Customer Success dashboard page and click the Create button.

- 1. Create and Manage Multiple Views**

The dashboard allows you to handle multiple views for better data organization. By using the View dropdown at the top of the dashboard, you can create a new view, manage existing views, or clear a current view. Note that these actions require admin privileges to execute.

- 2. Filter by a Column Value**

You can refine your data visibility by filtering column values. To apply a filter, click the column title icon and input your desired filter criteria. This feature is available on columns that have filtering enabled.

- 3. Sort by a Column Value**

Sorting records can be easily done by selecting a column title and double-clicking it. This function enables you to arrange records in either forward or reverse order based on the selected column.

- 4. View Activity History**

For transparency and audit purposes, all modifications to data are logged. Access these details by clicking the three dots on the top right corner of the dashboard and selecting Activity History.

With these functionalities, the Customer Success Dashboard serves as a robust tool for managing customer relationships efficiently. By simplifying the process of adding records and offering insightful management tools, it provides a comprehensive overview and control over customer success within your organization.