Appvibe Customer Success Dashboard

Overview of Features

Key Features

The Appvibe Customer Success Dashboard is a Jira-connected application specifically designed to enhance the oversight of customer health metrics, manage onboarding progress, and track support tickets effectively. The app serves as a powerful tool for project managers and developers alike, providing the necessary insights and controls to improve overall customer success management. By integrating directly with Jira, it streamlines the process of tracking customer-related activities, allowing teams to act promptly and decisively on incoming data.

The importance of customer feedback cannot be overstated when it comes to maintaining strong customer accounts. By utilizing the Appvibe Customer Success Dashboard, organizations can gather, organize, and act upon feedback efficiently, thus ensuring that customer needs and expectations are met consistently. This approach not only fosters better relationships with customers but also helps in proactively identifying and mitigating any potential issues before they escalate.

- **Feedback Submission**: Capture feedback seamlessly through Jira issues and dedicated forms.
- **Organized Views**: Use tags, filters, and saved views to sort and prioritize feedback efficiently.
- **Direct Jira Integration**: Link customer feedback to Jira issues, ensuring actionable follow-ups.
- **Customizable Layout**: Add, remove, or rearrange columns to suit your team’s feedback tracking needs.
- **Activity History**: Maintain a clear log of actions and updates made to each feedback record.

By leveraging the Appvibe Customer Success Dashboard’s comprehensive features, teams are empowered to take a proactive approach in managing customer relationships. This leads to increased satisfaction, retention, and ultimately, the success of both customers and the business.

Getting Started

Installation

Customer Success Dashboard is a Jira app designed to help manage customer interactions and ensure customer satisfaction. Follow these steps to install and access the app in your Jira environment.

Step 1:

Log in to Jira. Ensure you are logged in with Admin privileges to access the necessary features and settings for app installation.

Step 2:

Open the Atlassian Marketplace. In Jira, click on **Apps** in the main menu, then select **Explore more apps** to navigate to the Marketplace.

Step 3:

Search for **Appvibe Customer Success Dashboard**. Use the search bar in the Marketplace to locate the app.

Step 4:

Install the App. Click **Get app** or **Try it free**, confirm the installation, and grant the required permissions.

Step 5:

Verify the installation. After installation, go to **Manage Apps** in the Admin section to ensure the app is enabled.

Once the installation is complete, you can find a link to the Customer Success Dashboard under the **Apps** section in the menu on the left side of the screen. This setup enables you to efficiently manage customer success processes directly within Jira, enhancing your ability to meet customer needs and expectations.

Configuration

Setup and Customization

Navigate to the configuration and setup of the Appvibe Customer Success Dashboard by choosing **Manage Apps** in Jira. Locate the app and click on the **Configuration** button. This action 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 Customer Success Dashboard app supports three roles:

1. **Admin**: This super role grants full access to all features, including configuration and setup.
2. **Editor**: This role allows users to fully update and view Customer Success Dashboard data.
3. **Viewer**: This role enables users to view but not update the data.

An administrator can assign these roles to any Jira groups. By default, a Jira Administrator has access to the Customer Success Dashboard configuration screens.

System Fields

The app includes predefined fields essential for the Customer Success Dashboard:

- **Account Name**
- **Health Score**
- **Last Interaction**
- **Onboarding Status**
- **Support Tickets**
- **Account Manager**
- **Tags**

These system fields form the core data visualization elements in the dashboard.

Custom Fields

To define additional fields, use the **Add Field** button. You can customize fields with the following options:

- **Field Key**: Unique identifier for the field.
- **Field Label**: Descriptive label for the key.
- **Field Type**: Data type selection (Text, Number, Date, Select, Multi-Select).
- **Required**: Determines if the field is mandatory.
- **Sortable**: Indicates if the field can be sorted.
- **Filterable**: Allows the field to be filtered.

Conditional Formatting

Configure conditional formatting to enhance data interpretation. Conditions are set based on field values, and if met, labels and highlight colors are adjusted accordingly to provide visual cues.

Summary

The Appvibe Customer Success Dashboard configuration page provides robust features for managing roles, essential fields, custom attributes, and conditional data visualization. Effortlessly tailor the dashboard to meet your project management needs in Jira, empowering teams with actionable insights into customer success metrics.

Working With Records

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.

FAQ

FAQ

What is the object and purpose of this app?
The purpose of the app is for Customer Account Management. It is designed to track customer health metrics, onboarding progress, and support tickets to improve customer success management.

What types of feedback can the app track?
The app supports tracking Customer Success Account Name, Health Score, Last Interaction, Onboarding Status, Support Tickets, and Account Manager. 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 Customer Success Dashboard. 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 Customer Success Dashboard app simplifies managing and accessing customer success data within Jira. This app allows businesses to track customer health metrics, monitor onboarding progress, and manage support tickets, thereby enhancing customer success management.

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.