

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.

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