

Working With Records

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Adding and Viewing Records

Adding records in the Appvibe Freelancer Task Coordinator is straightforward and flexible, allowing you to manage freelancer tasks efficiently. Records can be added at a system-wide, project-specific, or individual Jira issue level, adapting to your organizational needs.

To add a record, navigate to the Freelancers dashboard and click the "Create" button. You will have the option to enter data for various fields including Task Name, Freelancer Name, Deadline, Payment Terms, Assigned Project, and Status. Additional custom fields that suit your project requirements can also be defined and included.

Once your records are created, you can manage and customize how they are displayed on the Freelancers dashboard through the following features:

1. **Create and Manage Multiple Views:** Access different record views by selecting the "View" dropdown at the top of the dashboard. You can create new views, manage existing views, or clear a view. Admin role is required to perform view-related changes.
2. **Filter by a Column Value:** Filter records by selecting the column title icon and entering the desired filter criteria. Note that filtering is available only on columns where this feature is enabled.
3. **Sort by a Column Value:** Organize your records by selecting a column title and double clicking on it, allowing you to sort in either ascending or descending order.
4. **View Activity History:** Track user actions that modify data by accessing Activity History. Click the three dots on the top right corner of the dashboard and select Activity History for detailed logs.

Managing freelancer tasks with the Appvibe Freelancer Task Coordinator enhances your task tracking and coordination capabilities. With customizable fields and a dynamic dashboard, you can tailor your project management approach to fit any project requirements.