Configuration

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Setup and Customization

Navigating to the configuration and setup for the Appvibe Marketing Campaign Tracker app is straightforward. Go to **Manage Apps** in Jira, locate the app, and click on the **Configuration** button. This will take you to the configuration page, where you can set up roles, view system fields, add custom fields, and configure conditional formatting to optimize your marketing campaign tracking.

Roles and Permissions

The Appvibe Marketing Campaign Tracker features three distinct roles:

1. **Admin**: This role grants complete access to the app, including configuration and setup capabilities. Admins can manage roles and permissions across all Jira user groups.
2. **Editor**: Users with the editor role can fully update and view marketing campaign data but do not have configuration access.
3. **Viewer**: This role limits the user to view-only rights, allowing them to see but not modify campaign data.

By default, users with Jira Administrator privileges can access Marketing Campaign Tracker's configuration screens and assign these roles to different Jira groups.

System Fields

The app comes with predefined fields essential for tracking marketing campaigns. These include:

- Campaign Name
- Target Audience
- Budget
- Start Date
- End Date
- Campaign Status
- Tags

These fields are base requirements for using the Marketing Campaign Tracker.

Custom Fields

To tailor the app to your specific needs, you can define additional custom fields. By selecting the **Add Field** button, you can create new fields with the following options:

- **Field Key**: A unique identifier for the field.
- **Field Label**: The displayed name of the field.
- **Field Type**: Choose from Text, Number, Date, Select, or Multi-Select.
- **Required**: Specify if this field must be filled in.
- **Sortable**: Indicate if the field can be sorted.
- **Filterable**: Determine if the field can be filtered.

Conditional Formatting

Conditional formatting enables you to automatically style your data when specific conditions are met. You can set up conditions based on field values and specify changes to labels and highlight colors when these criteria are satisfied.

Summary

Configuring Appvibe Marketing Campaign Tracker ensures that your team can effectively monitor and analyze marketing campaigns within Jira. With roles, permissions, system fields, custom fields, and conditional formatting, you can customize the app to your workflow's specific needs, providing flexibility and control in managing marketing data.