

# Appvibe Procurement Tracker

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# Overview of Features

# Key Features

Appvibe Procurement Tracker is a comprehensive Jira app designed to streamline the management of procurement requests, purchase orders, and supplier information. The app provides a seamless connection to budget approvals, ensuring that all procurement activities are efficiently tracked and managed. By integrating directly with Jira, the app allows project managers and developers to have a cohesive view of procurement workflows, thereby reducing the complexity involved in traditional procurement processes.

Incorporating customer feedback into the procurement order process enhances decision-making and aligns procurement strategies with actual user needs. By capturing and analyzing feedback, teams can better anticipate supply chain requirements, identify potential improvements, and ultimately, optimize procurement efficiency.

- **Feedback Submission:** Capture feedback seamlessly through Jira issues and dedicated forms, allowing for a structured and hassle-free submission process.
- **Organized Views:** Utilize tags, filters, and saved views to sort and prioritize feedback efficiently, ensuring that valuable insights are easily accessible.
- **Direct Jira Integration:** Link customer feedback to Jira issues, ensuring actionable follow-ups and closing the loop on feedback processing.
- **Customizable Layout:** Add, remove, or rearrange columns to suit your team's feedback tracking needs, providing flexibility and adaptability to your unique processes.
- **Activity History:** Maintain a clear log of actions and updates made to each feedback record, enhancing transparency and accountability.

By leveraging the key features of Appvibe Procurement Tracker, procurement teams can effectively manage and align their operations with user and business requirements. This not only streamlines procurement workflows but also ensures that organizational objectives are met with greater efficiency and precision.

# Getting Started

# Installation

Procurement Tracker is a Jira app designed to streamline your procurement processes directly within your project management environment. Follow these steps to install and enable it on your Jira instance.

## Step 1:

Log in to your Jira account. Ensure you are logged in with Admin privileges to manage app installations.

## Step 2:

Open the Atlassian Marketplace. In Jira, click on **Apps** in the top navigation, then select **Explore more apps** to access the Marketplace.

## Step 3:

Search for **Appvibe Procurement Tracker**. Use the search bar to locate the app in the Marketplace.

## Step 4:

Install the App. Click on **Get app** or **Try it free**. Confirm the installation process and grant the required permissions to proceed.

## Step 5:

Visit the Manage Apps section. Once the app is installed, navigate to the **Manage Apps** area in the Admin section to ensure it is enabled.

Upon successful installation, you will find a link to Procurement Tracker under the **Apps** section in the menu on the left side of the Jira interface.

Enhance your procurement management directly within Jira by installing Procurement Tracker, allowing for efficient tracking and management of your procurement activities.

# Configuration

# Setup and Customization

Navigate to the configuration and setup of the Appvibe Procurement Tracker by accessing Jira's Manage Apps section. Locate the app and click the "Configuration" button. This action redirects you to the procurement tracker configuration page, where you can define roles and permissions, manage system fields, create custom fields, and set up conditional formatting.

## Roles and Permissions

The Appvibe Procurement Tracker supports three roles:

1. **Admin:** This super role provides complete access, including configuration and setup capabilities.
2. **Editor:** Allows users to fully update and view Procurement Tracker data.
3. **Viewer:** Permits users to view, but not alter, Procurement Tracker data.

Administrators have the power to assign these roles to any Jira groups. By default, a Jira Administrator can access the Procurement Tracker configuration screens.

## System Fields

Procurement Tracker comes with predefined fields essential for its functionality, which include:

- Order Number
- Supplier
- Item Description
- Quantity
- Cost
- Approval Status
- Tags

These fields constitute the fundamental data elements required for operation within the app.

## Custom Fields

To accommodate additional data requirements, you can define custom fields by selecting the "Add Field" button. Upon creation, each field requires the following specifications:

- **Field Key:** A unique identifier for the field.
- **Field Label:** A description for the key.
- **Field Type:** The data type, options include Text, Number, Date, Select, Multi-Select.
- **Required:** Flag to determine if the field is mandatory.
- **Sortable:** Flag to specify if the field can be sorted.
- **Filterable:** Flag to indicate if the field can be filtered.

## Conditional Formatting

Conditional formatting enables dynamic data presentation based on specific field values. Conditions can be established to alter the appearance of labels and highlight colors when certain criteria are satisfied.

## Summary

In summary, the configuration and setup of the Appvibe Procurement Tracker within Jira provide a robust framework for managing procurement processes. By leveraging roles and permissions, system fields, custom fields, and conditional formatting, you can tailor the app's functionality to meet your organization's needs efficiently.



# Working With Records

# Adding and Viewing Records

Adding records to Appvibe Procurement Tracker is seamless, offering flexibility to associate records at a system, project, or Jira Issue level. Developers and project managers can ensure precise tracking and management of procurement processes directly within their Jira environment.

When adding a record, users can input data into the following fields: Order Number, Supplier, Item Description, Quantity, Cost, Approval Status, and any custom fields defined for enhanced tracking. Start by navigating to the Procurement dashboard page and click the Create button to enter the necessary details. Once the record is created, it becomes accessible within the Procurement dashboard for further actions.

1. **Create and Manage Multiple Views**

Customize how you display procurement records by accessing the View dropdown at the top of the dashboard. Here, you can create new views, manage existing ones, or clear a view. Note that changes to views require admin role permissions.

2. **Filter by a Column Value**

Enhance data visibility by applying filters to columns. Click on the column title icon and input your filter criteria. Filters are available only on columns with the filter feature enabled.

3. **Sort by a Column Value**

Organize records by sorting them based on any column. Select and double-click the column title to toggle between ascending or descending order, providing an efficient way to view data priorities.

4. **View Activity History**

Track modifications to procurement records utilizing Activity History. Access this by clicking the three dots in the upper right corner of the dashboard and selecting Activity History, ensuring transparency of data changes.

Overall, Appvibe Procurement Tracker provides robust functionality to add, manage, and organize procurement data within Jira, enhancing project transparency and control. By offering multiple customization options and detailed activity oversight, it caters to the nuanced needs of developers and project managers alike.

# FAQ

# FAQ

**What is the object and purpose of this app?**

The purpose of the app is for Procurement Order. It is designed to monitor procurement requests, purchase orders, and supplier information, with links to budget approvals.

**What types of feedback can the app track?**

The app supports tracking Procurement Order Number, Supplier, Item Description, Quantity, Cost, and Approval Status. You can also add custom fields for other related attributes 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 Procurement Tracker. 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 Procurement Tracker app makes it easy to manage and access Procurement within Jira. The app allows a business to monitor procurement requests, purchase orders, and supplier information, with links to budget approvals.

**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>