

Working With Records

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Adding and Viewing Records

Adding records to the Appvibe SaaS Subscription Manager is a straightforward process. With the flexibility to add records at the system, project, or Jira Issue level, users can maintain organized subscription details across various contexts. Once you have access to the Subscriptions dashboard, you can easily manage essential information for your SaaS subscriptions.

When adding a new record, input information in the fields provided: Plan Name, Customer, Renewal Date, Subscription Cost, Usage Limits, and Status. Additionally, you can include any custom fields you've set up to tailor the record to your specific needs. Navigate to the Subscriptions dashboard page and click the Create button to enter your data, including tags to further categorize or organize the subscriptions.

The Subscriptions dashboard offers robust functionality for managing and interacting with your data:

1. **Create and Manage Multiple Views**

Gain customized insights by creating and managing multiple views with the View drop-down menu at the top of the dashboard. This feature allows you to create new views, manage existing ones, or clear out views. Note: only users with admin roles can make changes to these settings.

2. **Filter by a Column Value**

Refine your data by filtering column values. Access the column title icon to apply your desired filter. Filtering capabilities depend on whether filtering is enabled for the specific column.

3. **Sort by a Column Value**

Organize records efficiently by sorting based on a specific column. By selecting and double-clicking a column title, records can be sorted in either forward or reverse order according to your needs.

4. **View Activity History**

Keep track of data modifications through the Activity History. Access this feature by clicking the three dots on the dashboard's top-right corner and selecting Activity History, ensuring transparency and accountability in data management.

Utilizing the Appvibe SaaS Subscription Manager's features simplifies the management of SaaS subscriptions. With intuitive record adding, robust viewing and filtering options, and comprehensive activity history tracking, this app integrates seamlessly into your Jira project management workflow.