

# Appvibe SaaS Subscription Manager

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# Overview of Features

# Key Features

Appvibe SaaS Subscription Manager is a powerful tool designed to monitor subscription plans, renewals, and usage metrics effectively for SaaS products. Seamlessly integrating with Jira, the app provides a streamlined process for connecting various SaaS accounts to Jira issues, allowing teams to manage subscriptions from a single, unified platform.

By incorporating customer feedback into the subscription management process, Appvibe empowers teams to refine subscription plans to meet customer needs better. Feedback aids in identifying key areas for improvement, aligning product offerings with market demands, and optimizing renewals and upgrades based on customer insights.

- **Feedback Submission:** Capture feedback seamlessly through Jira issues and dedicated forms.
- **Organized Views:** Use tags, filters, and saved views to sort and prioritize feedback efficiently.
- **Direct Jira Integration:** Link customer feedback to Jira issues, ensuring actionable follow-ups.
- **Customizable Layout:** Add, remove, or rearrange columns to suit your team's feedback tracking needs.
- **Activity History:** Maintain a clear log of actions and updates made to each feedback record.

In conclusion, Appvibe SaaS Subscription Manager equips teams with the tools to enhance subscription management while prioritizing customer feedback to optimize service offerings and ensure customer satisfaction.

# Getting Started

# Installation

SaaS Subscription Manager is a Jira app designed to help teams efficiently manage and track their SaaS subscriptions. Follow the steps below to install and enable the Appvibe SaaS Subscription Manager in your Jira environment.

## Step 1:

Log in to Jira. Ensure you are logged in with Admin privileges.

## Step 2:

Open the Atlassian Marketplace by clicking on **Apps** → **Explore more apps** in Jira.

## Step 3:

Search for **Appvibe SaaS Subscription Manager** in the search bar of the marketplace.

## Step 4:

Install the app by clicking **Get app** or **Try it free**. Confirm the installation process and grant the required permissions.

## Step 5:

After installation, navigate to **Manage Apps** in the Admin section to verify that the app is enabled.

Once the Appvibe SaaS Subscription Manager is installed, you can find its link under the **Apps** section in the menu on the left side of your Jira screen. This app will help streamline the management of all your team's SaaS subscriptions within your existing Jira infrastructure.

# Configuration

# Setup and Customization

Navigate to the configuration and setup of the Appvibe SaaS Subscription Manager app through Jira's "Manage Apps" section. Locate the app and click on the "Configuration" button. This will take you to the configuration page, where you can set up Roles and Permissions, view System Fields, create Custom Fields, and configure Conditional Formatting.

## Roles and Permissions

The Appvibe SaaS Subscription Manager app includes three distinct roles:

1. **Admin:** This super role provides full access to all features, including configuration and setup.
2. **Editor:** Users with this role can update and view all SaaS Subscription Manager data.
3. **Viewer:** This role permits users to view but not update the data.

An administrator can assign these roles to any Jira groups. By default, anyone with Jira Administrator privileges has access to the SaaS Subscription Manager configuration screens.

## System Fields

The app comes with predefined fields essential for managing SaaS subscriptions:

- Plan Name
- Customer
- Renewal Date
- Subscription Cost
- Usage Limits
- Status
- Tags

These fields form the base structure necessary for effective subscription management.

## Custom Fields

To define additional fields, you can select the "Add Field" button. This enables the creation of a new field with the following options:

- **Field Key:** A unique identifier for the field.
- **Field Label:** A user-friendly label for the field.
- **Field Type:** Choose from Text, Number, Date, Select, or Multi-Select.
- **Required:** Specify if the field is mandatory.
- **Sortable:** Indicate if the field can be sorted.
- **Filterable:** Determine if the field can be used as a filter.

## Conditional Formatting

Conditional Formatting allows you to dynamically style your data. Set conditions based on field values; when conditions are met, you can alter label text and highlight colors to enhance data visibility.

## Summary

In summary, the Appvibe SaaS Subscription Manager app provides robust configuration options within Jira. Through defining roles, utilizing system fields, adding custom fields, and employing conditional formatting, you can tailor the app to fit your project management and software development needs.



# Working With Records

# 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.

# FAQ

# FAQ

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

The purpose of the app is for Subscription Plan Management. It is designed to monitor subscription plans, renewals, and usage metrics for SaaS products, linking accounts to Jira issues.

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

The app supports tracking Subscription Plan Name, Customer, Renewal Date, Subscription Cost, Usage Limits, and Status. You can also add custom fields for other related information 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 SaaS Subscription Manager. 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

Support

# Appvibe Support

**Overview:**

We are here to help you. The Appvibe SaaS Subscription Manager app makes it easy to manage and access Subscriptions within Jira. The app allows a business to monitor subscription plans, renewals, and usage metrics for SaaS products, linking accounts to Jira issues.

**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>