# 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.

---

Revision #1
Created 3 January 2025 03:11:39 by Admin
Updated 3 January 2025 03:11:39 by Admin