Appvibe Sales Pipeline Manager

Overview of Features

Key Features

Appvibe Sales Pipeline Manager is a powerful Jira app designed for managers to oversee leads, sales opportunities, and client interactions seamlessly. By offering a comprehensive lens into the sales pipeline, it equips teams with the tools needed to track and optimize every stage of the customer journey efficiently.

Gathering and utilizing customer feedback is crucial for identifying sales opportunities and enhancing the sales strategy. The Appvibe Sales Pipeline Manager allows teams to capture this feedback directly within Jira, enabling data-driven decisions that can lead to closing more deals.

- **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.

By centralizing feedback and aligning it with actionable steps, Appvibe Sales Pipeline Manager supports teams in refining their sales processes, ultimately driving better sales outcomes and customer satisfaction.

Getting Started

Installation

Sales Pipeline Manager is an essential app for managing sales workflows directly within Jira. Follow these steps to successfully install and access the app.

Step 1:

Log in to Jira using your credentials. Ensure that you have Admin privileges to carry out the installation process.

Step 2:

Open the Atlassian Marketplace by clicking on Apps in the top menu, then select Explore more apps.

Step 3:

Search for **Appvibe Sales Pipeline Manager** using the search bar.

Step 4:

Install the App by clicking Get app or Try it free. Follow the prompts to confirm the installation and grant the required permissions.

Step 5:

Once installed, navigate to Manage Apps in the Admin section to confirm that Sales Pipeline Manager is enabled.

After installation, access Sales Pipeline Manager via the Apps section in the menu on the left side of your Jira screen. This tool will enhance your team's ability to efficiently manage and track sales activities within your projects.

Configuration

Setup and Customization

Accessing and configuring the Appvibe Sales Pipeline Manager in Jira is straightforward. Once installed, navigate to 'Manage Apps', locate the Appvibe Sales Pipeline Manager, and click on the 'Configuration' button. This action redirects you to the configuration page where you can manage Roles and Permissions, view and adjust System Fields, set up Custom Fields, and configure Conditional Formatting for the app.

Roles and Permissions

The Appvibe Sales Pipeline Manager app supports three roles:

1. **Admin**: This super role allows complete access to all configuration and setup options.
2. **Editor**: This role permits users to update and view Sales Pipeline Manager data.
3. **Viewer**: Allows users to view data but not make updates.

Administrators can assign these roles to any Jira groups. By default, a Jira Administrator has access to the Sales Pipeline Manager configuration screens.

System Fields

The app includes predefined fields essential for managing sales pipelines:

- **Lead Source**
- **Opportunity Value**
- **Stage**
- **Assigned Sales Rep**
- **Close Date**
- **Status**
- **Tags**

These fields form the base structure necessary for effective sales pipeline management.

Custom Fields

To customize further, use the Custom Fields section. Click the 'Add Field' button to create a new field with the following options:

- **Field Key**: A unique identifier for the field
- **Field Label**: The display name for the field
- **Field Type**: Choose from Text, Number, Date, Select, or Multi-Select
- **Required**: Flag to make the field mandatory
- **Sortable**: Flag to allow sorting by this field
- **Filterable**: Flag to enable filtering by this field

Conditional Formatting

The app allows conditional formatting based on certain field values. Define conditions to modify labels and highlight colors when specific criteria are met, enhancing data visualization and management efficiency.

Summary

Configuring the Appvibe Sales Pipeline Manager empowers teams to tailor their sales pipeline management to their needs. With flexible roles, essential system fields, customizable options, and intuitive conditional formatting, the app provides a robust solution for tracking and managing sales opportunities within Jira.

Working With Records

Adding and Viewing Records

Adding records to the Appvibe Sales Pipeline Manager is straightforward and allows you to track and manage your sales activities efficiently. You can add records at a system, project, or Jira Issue level to help organize your sales efforts across different scopes within your organization.

To add a record, navigate to the Sales Pipeline dashboard page and click the Create button. Fill in the required data fields, including Lead Source, Opportunity Value, Stage, Assigned Sales Rep, Close Date, and Status. You can also include any tags and your predefined custom fields to tailor the records to your specific requirements.

Once your records are created, you can view and manage them through the Sales Pipeline dashboard. The dashboard offers several key functionalities:

1. **Create and Manage Multiple Views**
   Select the View drop-down at the top of the dashboard to create new views, manage existing ones, or clear a view. Note that only users with an admin role can make changes to views.
2. **Filter by a Column Value**
   Filter records by clicking on a column title icon and entering your filter criteria. Filtering is available only on columns with this feature enabled.
3. **Sort by a Column Value**
   Sort records by selecting and double-clicking a column title. Sorting can be done in both forward and reverse order to suit your data analysis needs.
4. **View Activity History**
   Access the history of user activity by clicking the three dots on the top right of the dashboard and selecting Activity History. This feature records all modifications made to data, aiding in auditing and tracking changes.

In summary, the Sales Pipeline Manager provides a flexible and robust platform to manage your sales data. From adding detailed records to customizing dashboard views, filtering, sorting, and reviewing activity history, these features ensure efficient sales management within Jira.

FAQ

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What is the object and purpose of this app?
The purpose of the app is for Sales Opportunity. It is designed to manage leads, sales opportunities, and client interactions, providing a clear view of the sales pipeline.

What types of feedback can the app track?
The app supports tracking Sales Pipeline Lead Source, Opportunity Value, Stage, Assigned Sales Rep, Close Date, and Status. You can also add custom fields for other related fields that 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 Sales Pipeline 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

Appvibe Support

Overview:

We are here to help you. The Appvibe Sales Pipeline Manager app makes it easy to manage and access your sales pipeline directly within Jira. This app enables businesses to efficiently manage leads, sales opportunities, and client interactions, providing a clear and structured view of the sales pipeline.

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.