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.

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