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.

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