Configuration

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Setup and Customization

To configure and set up the Appvibe Vendor Management System app in Jira, navigate to **Manage Apps**, locate the app, and select the **Configuration** button. This action will redirect you to the configuration page where you can set up roles and permissions, view system fields, set up custom fields, and configure conditional formatting.

Roles and Permissions

The Appvibe Vendor Management System app includes three roles:

1. **Admin** - This super role grants access to all features, including configuration and setup.
2. **Editor** - Allows users full access to update and view Vendor Management System data.
3. **Viewer** - Grants users the ability to view, but not update, Vendor Management System data.

Administrators can assign these roles to any Jira groups. By default, a Jira Administrator has access to the Vendor Management System configuration screens.

System Fields

The app includes predefined Vendor Management System fields necessary for effective vendor management. These fields are:

- Vendor Name
- Service Provided
- Contract Status
- Rating
- Last Review Date
- Contact Info
- Tags

These are considered base fields integral to the Vendor Management System.

Custom Fields

To define additional fields, use the **Add Field** button. You can create a new field with the following options:

- **Field Key**: A unique identifier for the field.
- **Field Label**: The label associated with the key.
- **Field Type**: The data type for the field; options include Text, Number, Date, Select, Multi-Select.
- **Required**: A flag to specify if the field is mandatory.
- **Sortable**: Determines if the field can be sorted.
- **Filterable**: Determines if the field can be filtered.

Conditional Formatting

Configure conditional formatting to modify data display based on specific criteria. These conditions are set using field values, allowing for dynamic label and highlight color changes when conditions are met.

Summary

The Appvibe Vendor Management System offers comprehensive tools for managing vendor-related information within Jira. Its flexible configuration options for roles, fields, and formatting ensure it can be tailored to your organization's needs, streamlining vendor data management efficiently.