Working With Records

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Adding and Viewing Records

Adding records to the Vendor Management System in Jira is a straightforward process, allowing you to maintain up-to-date vendor information at various organizational levels—system, project, or specific Jira issues. By centralizing vendor records, you streamline your workflow and ensure continuity in vendor interactions.

To add a record, navigate to the Vendors dashboard page and click the "Create" button. You can input data for essential fields such as Vendor Name, Service Provided, Contract Status, Rating, Last Review Date, and Contact Info. Additionally, there is flexibility to include custom fields you have defined in the system. These steps ensure your vendor records are comprehensive and tailored to your specific needs. Once a record is created, it becomes accessible within the Vendors dashboard.

1. **Create and Manage Multiple Views**: In the dashboard, you can manage how you view vendor data by selecting the "View" dropdown at the top. This feature allows for creating new views, managing existing ones, or clearing a view. Note that these actions require admin role access to ensure proper management of data presentation.
2. **Filter by a Column Value**: For targeted data analysis, filter a column by selecting the column title icon and entering the desired criteria. This function is available only for columns with filtering enabled, ensuring you quickly find relevant vendor information.
3. **Sort by a Column Value**: Sorting is intuitive; simply click on a column title and double-click to toggle between ascending and descending order. This functionality assists in organizing records based on any column, allowing for easy comparison and analysis of vendor data.
4. **View Activity History**: Transparency and tracking of modifications are crucial. You can access a log of all user activities that alter data by clicking the three dots at the top right of the dashboard and selecting "Activity History." This feature provides insights into changes for accountability and auditing purposes.

In summary, adding and managing records within the Appvibe Vendor Management System enhances your vendor oversight capabilities, offering a structured approach to data handling. The system's features facilitate comprehensive data management, empowering you to make informed decisions and maintain effective vendor relationships.