

# Appvibe Vendor Management System

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# Overview of Features

# Key Features

Appvibe Vendor Management System is a versatile Jira app designed to efficiently manage vendor information, contracts, and performance metrics, thereby enhancing supplier relationship management. By integrating seamlessly with Jira, it provides a centralized platform for tracking vendor-related activities, ensuring that your team can keep supplier data organized and up-to-date. This system facilitates proactive monitoring and management of vendor performance and contractual obligations, helping your organization build stronger, more productive vendor relationships.

Capturing customer feedback is pivotal to maintaining accurate vendor records and improving relationships. With Appvibe Vendor Management System, feedback is systematically collected and linked to vendor profiles, offering insights that can drive strategic decision-making. By translating customer and stakeholder feedback into actionable data, teams can continuously refine their vendor strategies, ensuring peak performance and satisfaction.

- **Feedback Submission:** Capture feedback seamlessly through Jira issues and dedicated forms. This feature ensures that every piece of feedback is documented and reviewed systematically.
- **Organized Views:** Utilize tags, filters, and saved views to sort and prioritize feedback efficiently, allowing your team to focus on the most critical insights.
- **Direct Jira Integration:** Link customer feedback directly to Jira issues for streamlined follow-ups, making feedback management an integral part of your workflow.
- **Customizable Layout:** Adapt the layout to your team's needs by adding, removing, or rearranging columns to optimize feedback tracking.
- **Activity History:** Maintain a comprehensive log of actions and updates made to each feedback record, ensuring transparency and trackability of feedback handling.

In conclusion, the Appvibe Vendor Management System enhances your ability to effectively manage vendor relationships by integrating customer feedback directly into your workflow. Its powerful features provide the tools necessary for tracking performance and making informed decisions, ensuring that your vendor management processes are both efficient and impactful.

# Getting Started

# Installation

Vendor Management System is a powerful Jira app designed to streamline and enhance vendor management processes. Follow these steps to install and set up the app in your Jira environment:

## Step 1:

Log in to Jira. Ensure you are logged in with Admin privileges to manage apps within your Jira instance.

## Step 2:

Open the Atlassian Marketplace by clicking on Apps in the top menu and selecting Explore more apps. This will direct you to the Marketplace.

## Step 3:

Search for **Appvibe Vendor Management System**. Use the search bar at the top of the Marketplace page to locate the app.

## 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:

After installation, navigate to Manage Apps in the Admin section to ensure the app is enabled.

At this point, you should find a link to the Vendor Management System in the Apps section of the menu on the left side of the screen.

By following these steps, you can successfully install and access the Vendor Management System to enhance your vendor management processes within Jira.

# Configuration

# 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.



# Working With Records

# 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.

# FAQ

# FAQ

**What is the object and purpose of this app?**

The purpose of the app is for Vendor Record. It is designed to track vendor information, contracts, and performance, aiding in supplier relationship management.

**What types of feedback can the app track?**

The app supports tracking Vendor Name, Service Provided, Contract Status, Rating, Last Review Date, and Contact Info. You can also add custom fields for other related information 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 "Vendor Management System", 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 Vendor Management System app makes it easy to manage and access Vendors within Jira. The app allows a business to track vendor information, contracts, and performance, aiding in supplier relationship management.

**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>