



Getting Started with Agile Accelerator

Salesforce, Summer '21



@salesforcedocs

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CONTENTS

AGILE ACCELERATOR	5
Install Agile Accelerator	6
Assign User Permission Sets	7
Create and Manage Teams	8
Product Tags	9
Create Product Tags	10
Save Your Favorite Product Tags	11
Custom Fields for Product Tags	12
Track and Manage Work	14
Create a Work Record	14
Relate a Case to a Work Record	16
Create a Task	17
Epics and Themes	18
Create and Assign Epics	21
Create and Assign Themes	22
Work Manager	23
Use Sprints in Agile Accelerator	24
Create a Sprint	24
Forecast Your Sprints	26
Use Kanban in Agile Accelerator	27
Create a Kanban Board	27
Edit Your Kanban Board's Columns	28
Add Work to Your Kanban Board	29
Manage Your Kanban Board	30
Customize Kanban Cards	31
Organize Your Portfolio with Portfolio Management	33
Create and Assign Projects	33
Create and Assign Programs	34
Create and Assign Portfolios	35
Configure Agile Accelerator	36
Customize the Status Picklist for Work Records	36
Customize Your Org's Agile Accelerator Pages	38
Replace Action Overrides	39
Configure Email Volume	40
Configure the Email2agile Service	41
Create User Stories and Bugs in Salesforce Mobile App	42
Use the Quick Create Work Record Google Chrome Extension	43

AGILE ACCELERATOR

Agile Accelerator helps you manage your agile product development with the same technology that's used in your Salesforce org. Your entire team can track user stories, bugs, reports, and more from within Salesforce.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

With Agile Accelerator, your information is secure and fully integrated with other Salesforce apps, such as Sales Cloud and Service Cloud. You can connect user stories and bugs to CRM cases and accounts. You can also integrate to other systems and easily extend Agile Accelerator to meet any business process.

Agile Accelerator comes with a default team, product tag, and several reports and dashboards for you to use in testing.



Note: By default, the sample reports located in the Agile Accelerator folder are available only to the administrator who installed the package. The administrator can share the reports with individual users, public groups, or roles.

Setting up your custom agile environment involves the following steps.

1. [Install Salesforce Agile Accelerator](#)
2. [Assign Permission Sets](#)
3. [Add Scrum Teams](#)
4. [Define Sprints](#)
5. [Create Work Records](#)
6. [Create Tasks](#)
7. [Use Work Manager](#)
8. [Configure the Email2agile Service](#) (optional)



Note: All instructions are provided for Lightning Experience. If you're using Salesforce Classic, the steps can vary.

Install Agile Accelerator

[Agile Accelerator](#) is available on AppExchange as a managed package.

USER PERMISSIONS NEEDED

To install packages:

Download AppExchange packages

Instructions for installing AppExchange managed packages can be found in the [Application Installation Guide](#).

After you've installed the package, check to see if it's there.

1. From Setup, enter `Apps` in the Quick Find box, then select **Apps** to see the list of apps that are installed in your organization.
2. Look for the Salesforce Agile Accelerator installed package.
3. After you've verified the installation, select **Salesforce Agile Accelerator** from the Application Selector in the upper right corner.

When you finish installing, assign permission sets.

Assign User Permission Sets

Agile Accelerator has two permission sets that you can assign to users: one with administrative permissions and the other for non-administrators.

USER PERMISSIONS NEEDED

To assign permission sets:

Assign Permission Sets

1. From Setup, enter **Users** in the Quick Find box, then select **Users**.
2. Click the user's name.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. Under Available Permission Sets, select a permission set and click **Add**.

To allow the user to use Agile Accelerator features, such as creating work records, sprints, and teams, select and add the **Agile Accelerator User** permission set.

To give the user admin privileges to Agile Accelerator, such as deleting teams, sprints, and releases, also select and add the **Agile Accelerator Admin** permission set.

5. Click **Save**.



Tip: You can perform this and other administration tasks from the SalesforceA mobile app.

SEE ALSO:

[Salesforce Help: Permission Sets](#)

Create and Manage Teams

Agile teams include cross-functional members such as, software engineers, architects, programmers, analysts, QA experts, testers, and UI designers. Defining your teams is one of the first steps to using Agile. After team members are added, you can assign the role and the availability of each member.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To create and manage teams: Agile Accelerator User
OR
Agile Accelerator Admin

To create or edit a team:

1. From within the application, click the **Teams** tab.
From here, you can either create a team or edit an existing team.
2. When the list view appears, click **New Team**.
Required fields appear with a red bar to the left of the field.
3. Choose a name and a department.
4. Enter the team members' names, their roles, and their availability allocations.
Although roles and allocation aren't required, knowing a team member's allocation is an important factor during sprint planning.
5. Enter a name for the Product Tag.
A product tag is required to create user stories and bugs for the team. You can also create tags from the Product Tag tab. Product tags drive assignment rules that allow you to automatically populate assignees on work records.
6. Click **Save**.

Product Tags

Product tags provide a way of organizing your work into logical categories. Product tags are unique for each team in your organization and are required when you're creating work items. So, you need at least one product tag for each team. Product tags are typically used to represent product areas or departments, but can represent whatever your organization decides.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

For example, let's say you have a small team that produces an application called Find Files. You can create a product tag called FindFiles and use it with all work items. But, what if the team is larger and produces your Find Files application for Android and iOS users? Half the team members work on iOS and the other half work on Android. You can then create two product tags called FindFiles-iOS and FindFiles-Android and use the two tags to separate the work for each group within the team.

When you create a product tag, you must define at least one assignment rule. When work items are created, an assignment rule automatically assigns work items to particular team members based on the product tag. Requiring an assignment rule ensures that no work item gets lost or goes unattended.

When you create an assignment rule, the roles of assignee and product owner are required. You can also add other members of the team such as a specific QA engineer. For example, you can assign a particular developer, product manager, and QA engineer to the FindFiles-iOS tag assignment rule. You can then assign different people to the FindFiles-Android rule. Team members can reassign the work item to other members of the team as needed, but the initial assignment is done by the assignment rule.

Product tags are created from the Team page or from the Product Tag tab in the main menu bar.

Create Product Tags

Create Product tags to organize your team's work into logical categories. Product tags are created from the Team tab or the Product Tag tab and are required when you create work items.

USER PERMISSIONS NEEDED

To create product tags:

Agile Accelerator User
OR
Agile Accelerator Admin

All work items require the assignment of a product tag. So, make sure you create at least one tag for your team.

To create a Product Tag:

1. From your team's page, on the Related tab, click **New** in the Active Product Tags section.
2. Enter a name for the Product Tag, and then click **Save**.
3. On the product tag page, inline edit and select **Active**.
4. Optionally, populate the other product tag fields, such as Default Category.
5. Click **Save**.
6. Enable the assignment rules for at least one type of work item (Bug, User Story, Investigation) by moving the toggle to active.
7. Optionally, you can complete other values, such as the assignee and QA engineer.
8. Click **Save Changes**.

Save Your Favorite Product Tags

Choose the product tags you use most often as your favorites. When you create a work item, your favorite product tags appear for 1-click selection.


Each user controls their favorite product tags in their user profile configuration.

USER PERMISSIONS NEEDED

To save favorite product tags:

Agile Accelerator User
OR
Agile Accelerator Admin

To save your favorite product tags:

1. Click  to open the App Launcher, and then select the Agile Accelerator app.
2. Go to your user profile page and locate the Favorite Product Tags component. By default, the Favorite Product Tags component is on a tab on the user profile page called Settings.
3. Type the name of your most commonly used product tag in the Product Tags field, and then select that product tag. The product tag appears in your Favorite Product Tags list. You can add multiple favorite product tags.
4. Use the grip icon next to each tag in the list to control the order the favorite product tags display when you create work items.



Note: The Settings tab only appears on your user profile page when you have selected the Agile Accelerator app.

Custom Fields for Product Tags

Add custom fields to product tags for values that are unique to a particular team or product tag. After a field is added, you can choose its visibility for each product tag.

USER PERMISSIONS NEEDED

To edit Product Tags: Agile Accelerator User
OR
Agile Accelerator Admin

If a field is only necessary for a few product tags, add it at the product tag level. If a field is necessary for the entire org, then add it at the Work object level.

For example, if you have a product tag called “Salesforce Mobile App”, you can create a new required field called “Mobile Device”. Then you can use it to track what model of mobile phone the bug or user story applies to. Users can select a device when creating a work record for only that product tag. Product tag fields can be configured to be visible or required for user stories, bugs, and investigations.

1. If you’re adding a custom field, you must first add it to the Work object’s additional fields:
 - a. In Object Manager in Setup, select the Work object and click **Field Sets**.
 - b. Select the **Additional Fields** field set.
 - c. To add the custom field to the field set and save your changes.
2. To view the product tag, go to your team’s page. On the Related tab, click the product tag name in the Active Product Tags section.
3. Click **Configure Product Tag Fields**. Scroll down to the Additional Fields section. The fields displayed here are controlled by the “Additional Fields” field set. An Admin in your org can add new fields to this field set via Setup > Object Manager > Work Object > Field Sets > Edit the field set called “Additional Fields”.
4. For each field, choose its visibility setting.

By default, all fields are hidden. To make a field visible, select Visible or Required for each type of work item where you want the field to appear.

5. Click **Save Changes**.

Custom fields appear at the bottom of the Create Work page under the Product Tag fields section.



Note: If you change the product tag on a work record, the fields on the work record can change based on the new product tag's settings. For example, if the new product tag doesn't have the custom field you added to the previous tag, the data doesn't show on the work record. The data isn't lost; it's still populated and you can view it on a report or list view. It shows up again on the work record when the custom field is added to the newly assigned product tag.

Track and Manage Work

Use work records to track units of work and tasks to assign components of that work to individual team members. Then use Work Manager to prioritize and manage your team's work.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

Create a Work Record

Use a work record to track a required set of tasks for your team. Two of the common types of work records are user stories and bugs.

USER PERMISSIONS NEEDED

To create work records:

Agile Accelerator User
OR
Agile Accelerator Admin

You can create user stories and bugs on the sprint wall by using the Work tab or the New Work button. These steps describe how to create work using the Work tab. Creating work using the sprints wall is identical.

To create a user story:

1. From the Work tab, click **New**, then select the User Story record type and click **Next**. Alternatively, from the Sprint tab, click **New** and select **User Story**.

Other record types include bugs and investigations. A description of each record type is shown in the record type list when creating a bug from the Work tab.

2. From Create Work, enter a short description in the Subject field and a detailed description in the Description field.
3. In the Product Tag field, start typing the name of your product tag to see suggestions. Select a product tag.

As you start typing in the Product Tag field, a list of suggestions appears. If you set up your product tag to auto-assign work records, the Assignee field is populated after you select the product tag. You can optionally create an assignment rule to assign a default team member from the Product Tag tab on your team's detail page.

4. In the Sprint field, start typing the name of your sprint to see a list of suggestions. Select a sprint from the list.
5. Click **Save**.

Notice the related lists at the bottom of the page. You can use the various related lists to discuss the user story, assign themes, relate it to other work records, and more.

SEE ALSO:

[Sprints](#)

[Product Tags](#)

Relate a Case to a Work Record

To see case information when viewing a related work record, you can link a case and a work record through a two-step process. First, you customize the Case page layout by adding a custom field, and then you populate that field with the work record number.

USER PERMISSIONS NEEDED

To customize page layouts:

Customize Application

To view page layouts:

View Setup and Configuration

First, customize the Case page layout.

1. In Object Manager, select the Case object and click **Case Page Layouts**.
2. Click the name of the case page layout you want to edit.

Many companies have more than one page layout for cases, such as one for sales and one for support. You can add the work field to any layout.

3. Locate the Work field and drag it to your desired location on the page layout.
4. Click **Save**.

After you've edited your layout, use the Work field to relate a work record to a case.

Create a case or edit an existing one. Look for the Work field. Use the lookup to select the work record.

When you save the case, a new tab appears on the work record.



Note: If you can't see the Work field even though you added it to the correct page layout, check your profile permissions for the field. From Object Manager in Setup, select the Case object, then click **Fields & Relationships**. Select the Work field, then click **View Field Accessibility**.

SEE ALSO:

[Salesforce Help: Page Layouts](#)

Create a Task

Within each user story, you can create tasks that are assigned to individual team members. That way, you can keep a detailed record of the progress for each story.

USER PERMISSIONS NEEDED

To create tasks: Agile Accelerator User
OR
Agile Accelerator Admin

It's especially helpful to create tasks when user stories are rather large or when more than one person is working on a user story.

To create a task from your sprint wall:

1. From your sprint, click the View Work with Tasks icon on the top right.
2. Double-click in the NOT STARTED column and a task appears.
The task is automatically assigned to whomever creates it.
3. In the Remaining field, enter the hours remaining on the task.

As you manage tasks for a user story, drag them from Planned to In Progress when starting the task. When you've completed a task, drag it to Completed.

You can also create a task from a work item.

1. From your work record, click **New** in the Tasks related list.
2. In the Assigned To field, select an owner.
3. Enter a subject for the task.
4. In the Starting Hours field, enter the hours previously spent on this task.
5. In the Remaining Hours field, enter the hours remaining on the task.
6. Enter the task status.
7. Save your work.

You can manage tasks created from a work record independently or from your sprint wall.

Epics and Themes

Understand how epics and themes can be used to organize and track your team’s work.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise, Performance, and Developer** Editions

Epics

An epic is a large user story that can’t be completed in a single sprint or sometimes even multiple sprints. Because epics are large projects, Agile teams break them down into smaller, manageable user stories. By grouping those smaller user stories together in one epic, you can track the larger project.

As an example, let’s use making a movie. The entire movie is the epic, and each scene in the movie is a user story. If you don’t break the movie into smaller parts, like scenes, it’s challenging to scope and manage things such as budget, actors, and filming time. Using a movie epic to group the individual scenes lets you track the status of the overall project.

Here are more examples of Epics where it can be necessary to break the project into smaller parts to judge the scope of the work:


- Creating a mobile application that tracks mobile visitors to your website.
- Creating a way to add users in bulk.

Training users how to use a new software release. For the first example, our epic looks like this:



Themes

Themes group similar user stories together. Some people refer to them as labels. All the user stories assigned to a theme are related. For example, they can all focus on a particular operating system or feature.

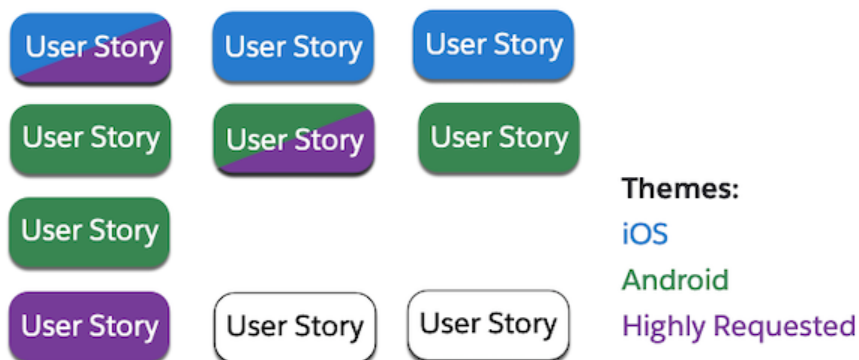
 **Note:** Each user story can belong to more than one theme, but only one epic.

Themes are more flexible than epics. A single user story can belong to more than one theme but only one epic. You can use a theme to group the user stories within a single epic, across epics, or even outside of epics.

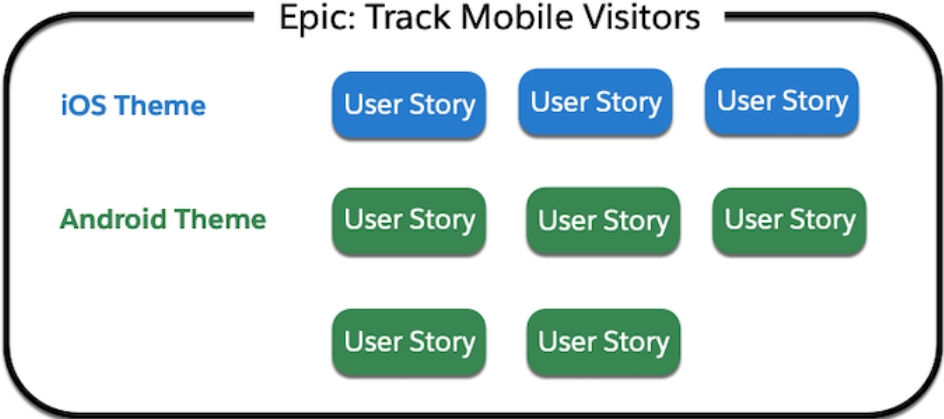
After you assign themes to work items, you can use an assignment rule to assign work items with that theme to particular team members. You can also create reports and dashboards based on themes.

Let's look at a few examples.

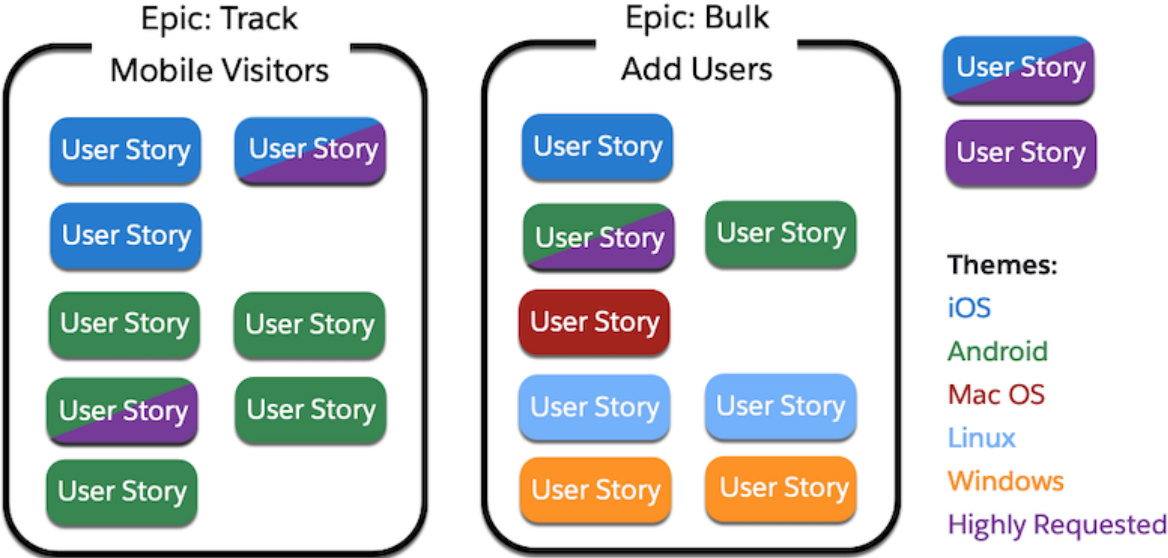
If none of your user stories are large enough to be an epic, you can use themes to group similar work, even if they don't have the same audience or goal. In this example, we see multiple user stories that involve iOS and Android mobile operating systems. We can use those themes to assign work with an assignment rule. We also want to identify user stories that have been highly requested so we can highlight them to customers, so some of our stories have two themes. Finally, some user stories don't have a theme at all.



We can also use themes to group work within an epic. For example, when creating a mobile application that tracks mobile visitors to your website, you must account for both iOS and Android. If you have different developers working on the two mobile operating systems, themes can help you organize the work within the epic.



Now you take on another project to bulk add users, including adding locally stored contacts. Because themes are assigned at the work record level, the iOS and Android themes can be used to group work across epics.



Note that this example also includes user stories with a theme but no epic, and user stories with two themes.

The flexibility of themes makes them a powerful tool. We recommend that you design themes with a specific purpose, such as reporting or work assignments, and make that purpose clear to your team.

Create and Assign Epics

Create epics to group your work records.

USER PERMISSIONS NEEDED

To create and assign themes:

Agile Accelerator User
OR
Agile Accelerator Admin

Create epics from the Epics tab.

1. On the Epics list view, click **New**.
2. Enter an Epic Name and, optionally fill out any other fields.
3. Click **Save**.

From the epic's detail page, you can see details about attachments, open activities, team dependencies, and work assigned. There are also burndown and burnup charts that show the remaining points assigned to the epic and the number of closed and open records by date.

To assign a work record to an Epic, there are two options.

- From the Epic's related lists, click **New** on the Work related list.
- From within a user story, enter the epic name in the Epic box on the detail page.



Important: Each user story can only belong to one epic.

Create and Assign Themes

Create and assign themes from a work record.

USER PERMISSIONS NEEDED

To create and assign themes:	Agile Accelerator User OR Agile Accelerator Admin
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To create a theme, go to the work item's Related list and find the Theme Assignment.

1. In Theme Assignment, click **New**.
2. Select **New Theme**.
3. Enter your Theme Name and click **Save**.

To add a theme to a work record, there are two options.

- From within the Theme, click **Add Work To Theme**.
- From within a User Story, enter the theme name in the theme related list.

Work Manager

Prioritize and manage your team's work with Work Manager. View all your team's work in one place and quickly edit work record values. For example, you can quickly assign multiple work items or update the status for multiple work records. Work Manager also provides better visibility for your team's work across the organization, allowing other teams to check for dependencies.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To view Work Manager:	Agile Accelerator User OR Agile Accelerator Admin
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To view Work Manager:

1. Click the **Work Manager** tab.
2. If you're on more than one team, select a team from the Team Picker and click **Continue**.

Work Manager shows you all open work items for your team. You can filter, edit, view charts and organize your backlog.

Use Sprints in Agile Accelerator

With Scrum, the product is built in a series of fixed-length iterations called sprints that give teams a framework for shipping software on a regular cadence. In Agile Accelerator, you can use sprints to organize your team's work into manageable chunks.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

Create a Sprint

After you have a team, create your sprints to organize your work.

USER PERMISSIONS NEEDED

To create sprints:

Agile Accelerator User
OR
Agile Accelerator Admin

Many teams use sprints that are two weeks long, but you can create any duration up to one month long. There's a sample sprint on the Sprint tab that's loaded with test data. If it's the first time that you've viewed a sprint, you're prompted to take a guided tour of the available features. You can skip the tour because you can click the Guided Tour link in the top-right corner of the screen at any time.

To create a sprint:

1. Click the **Sprint** tab.
2. When the list view appears, click **New**.
3. Enter the name of the sprint. The suggested format is yyyy.mm.sprint number(a-f). team name.

For example, if you have two-week sprints, the sprint that covered the first two weeks of September 2020 would be 2020.09a-MyTeamName. The second two weeks would be 2020.09b-MyTeamName. Following a naming convention helps with reporting later on.



Note: You can change the sprint naming convention by modifying the validation rule on the Sprint object in Setup. From the object management settings for sprints, go to Validation Rules, and then modify or de-activate the Verify Name Format validation rule.

4. Enter the name of the agile team that you created earlier in the Scrum Team field.
5. Populate the Start Date and End Date fields.

Make sure that start and end dates don't overlap with the dates of other sprints for your team. Again, a typical sprint is two weeks.

6. Click **Save**.

Your sprint wall appears.



Note: You can sort the work records by Assignee and QA Engineer. To filter the board by a specific person, click that person's picture at the top left of the sprint wall. To define advanced filters, click the filter icon on the right-hand side of the sprint wall header.

Forecast Your Sprints

Sprint forecasts give you deep insights to help your team become more predictable and reliable. Use this data to help your team be more efficient and effective in sprint retrospective sessions. You can also use forecasting to make better informed decisions during your retrospective and planning sessions.

USER PERMISSIONS NEEDED

To forecast sprints: Agile Accelerator User
OR
Agile Accelerator Admin

1. Add story points to each story in your sprint.
2. When you're ready to begin your sprint, click the **Confirm** link in the sprint wall header under "Forecast".
3. The Forecast Confirmation screen shows the number of points, work items, and user stories you're forecasting for this sprint.
4. Optionally, if your Definition of Ready has been met for these work items, select **Definition of Ready Met**.
5. To forecast the displayed values, click **OK**.



Important: After you forecast your sprint, you can't change the forecasted story point value.

The Forecast value on the sprint wall shows the number of story points your team has committed to this sprint.

6. To see the forecast details, click the Forecast story point number.

The forecast details include detailed metrics on your team's progress against the forecasted points and work items for this sprint.

Use Kanban in Agile Accelerator

If you prefer Kanban's visual process for tracking and managing your team's work, you can easily create a Kanban board specific to your team's needs. Easily manage your team's work by adding, moving, deleting, and filtering work items from the board.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions



Note: Not familiar with Kanban? Take the [Atlassian Overview of Agile Frameworks](#) and [Scrum and Kanban at Salesforce](#) Trailhead Modules.

Create a Kanban Board

Add or edit a Kanban board by adding the Kanban tab to your organization. If the team already has a Kanban board, clicking the Kanban tab opens the board for editing.

USER PERMISSIONS NEEDED

To create and edit Kanban boards: Agile Accelerator User
OR
Agile Accelerator Admin

1. Click the **Kanban Board** tab.
2. If you're assigned to multiple teams, select the team you want to create or view the Kanban board for, then click **Continue**.

If your team already has a Kanban board, the board appears.

3. If your team doesn't have a Kanban board yet, click **Create Kanban Board**.

After your board is created, you can add and remove columns and configure work in progress limits by clicking the "Settings" button.

Edit Your Kanban Board's Columns

Customize your Kanban board columns to suit your team's needs.

USER PERMISSIONS NEEDED

To create and edit Kanban boards: Agile Accelerator User
OR
Agile Accelerator Admin

1. Click the **Kanban Board** tab.
2. If you're assigned to multiple teams, and select the team, then click **Continue**.
3. Click the Settings icon.

The Kanban board edit screen appears.

4. Select a column and an action.

The selected column is highlighted.

- a. To remove a column or edit its properties, select **Update/Remove**. You can edit a column's label, work in progress (WIP) limit, and its mapping.



Note: Before deleting a column, you must move any work in that column to another column.

- b. To create a column to the right of the selected column, select **Create Sibling (on right)**.
- c. To create a column below the selected column, select **Create Child**.
- d. To create a swimlane for moving work through the Kanban board quickly, such as to expedite a particular story, select **Create Swimlane (bottom)**.



Note: You can't create a swimlane when a column is selected. If you selected a column and want to create a swimlane, click **Refresh Settings** to deselect any columns and cancel any pending changes.

5. To save your changes, click **Save**.

Save each change before editing, creating, or deleting the next item.

6. When you've saved all your changes, click **Close**.

Add Work to Your Kanban Board


Create work to add to your Kanban board. Or you can add existing work from the team's backlog or your recently viewed work records.

USER PERMISSIONS NEEDED

To create and edit Kanban boards: Agile Accelerator User
OR
Agile Accelerator Admin

1. Click the **Kanban Board** tab.
2. If you're assigned to multiple teams, the Team Picker appears. Select the team, then click **Continue**.
3. To create work and add it to your Kanban board, click **New**.
 - a. Select the Record Type and enter the Subject and Description.
 - b. Select a Product Tag.
 - c. In the Kanban State field, select the column where you want to add the work item.
 - d. Optionally, enter values for the other fields.
 - e. Save your work.

The new work appears on your Kanban board.

4. To add existing work from your team's backlog, click the folder icon ().
 - a. To add existing work from your team's backlog, click **Backlog**. To add from your recently viewed work records, click **Recent**.
 - b. Select the Kanban column where you want to add the work item.
 - c. To filter the list, use the **Type word to filter work** field.
 - d. Select one or more work items to add.
 - e. Click **Import**.

The work item appears on your Kanban board.


Manage Your Kanban Board

Manage and track your team's work from your Kanban board. You can move, delete, and filter work items.

USER PERMISSIONS NEEDED

To create and edit Kanban boards: Agile Accelerator User
OR
Agile Accelerator Admin

1. Click the **Kanban Board** tab.
2. If you're assigned to multiple teams, the Team Picker appears. Select the team, then click **Continue**.
3. Use the filter to search the cards on your board or to show or hide cards. For example, you can filter your board to show only user stories associated with a specific theme or a specific assignee.
4. To move work items, drag them to a new column.
5. To remove a card from your Kanban board, click the dropdown arrow in the bottom-left corner of the card and select **Remove Card**.

Cards in the Closed column remain on the board until you manually remove them. To remove all cards from the Closed column, click the  icon next to the Closed label.

Customize Kanban Cards

You can customize the color and attributes on your Kanban cards. For example, you can rename the default blue color for cards to “User Stories” and then assign it to each user story on the board. You can also choose which attributes appear on all cards, such as story points, work ID, and scheduled build.

USER PERMISSIONS NEEDED

To customize Kanban cards:

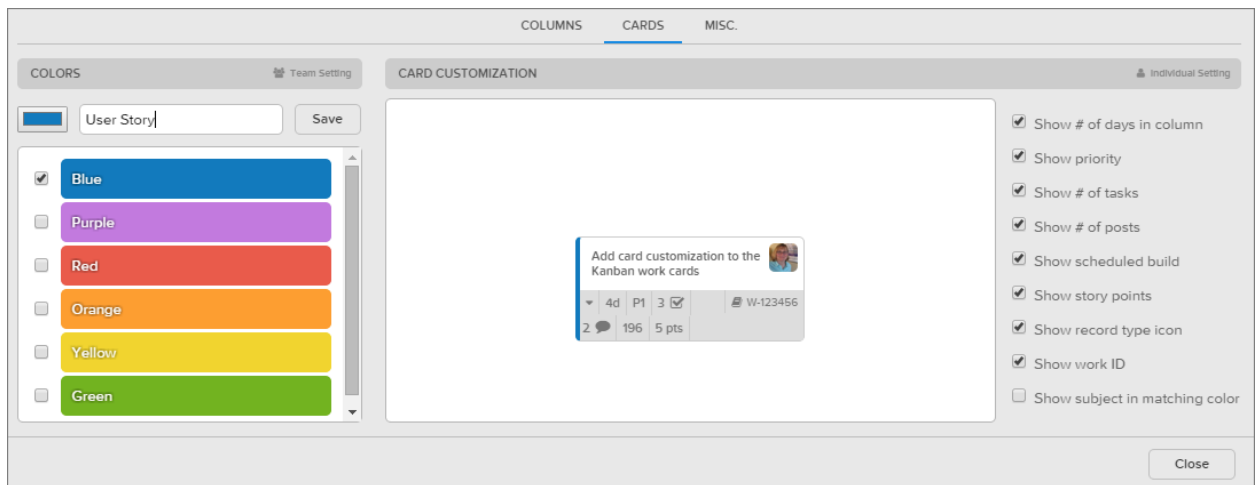
Agile Accelerator User
OR
Agile Accelerator Admin



Note: You can assign colors individually to cards, but the attributes you select affect all cards.

1. From your Kanban board, click the Settings icon.
2. Click **Cards**.

You see a representative card in the center that reflects the color you select.



3. In the Colors column, select a color and type an optional name.



Tip: Want a new color? Click the color selector to the right of the name field.

4. Click **Save**.
5. In the individual Settings column, choose the attributes to display on all cards.
6. Click **Save** and then **Close**.

To assign a color to a card, click the down arrow on the card and select a color. To remove a color from a card, click the down arrow on the card and select **Remove Color** from the Color options.

Each card can only have one color.

Organize Your Portfolio with Portfolio Management

Instead of stopping at epics, you can now have an entire hierarchy from project, to program, to portfolio. This gives you the ability to organize your product portfolio at a higher level for executives, project management, and program managers. This all rolls up nicely, and can be used in standard Salesforce reports, Tableau, or Einstein Analytics.

You can add accomplishments as a related list for projects or portfolios using page layouts. Accomplishments let you track high-level milestones for any project or program.

REQUIRED EDITIONS AND USER PERMISSIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise, Performance, and Developer** Editions

USER PERMISSIONS NEEDED

To use portfolio management: Agile Accelerator User
OR
Agile Accelerator Admin

Create and Assign Projects

A project is a collection of epics that form a logical body of work.

USER PERMISSIONS NEEDED

To use create and assign projects: Agile Accelerator User
OR
Agile Accelerator Admin

Create projects from the Projects tab.

1. On the Projects list view, click **New**.
2. Enter a Project Name and, optionally fill out any other fields.
3. Click **Save**.

From the project's detail page, you can see details about attachments, open activities, epics, and project health.



Note: If you already have Agile Accelerator installed and wish to connect your epics to the new Project object, you must manually add the Project field to the Epic page layout.

(Managed package upgrades cannot modify page layouts, so the field will not be automatically added for you.)

To assign an epic to a project, there are two options.

- From the project's related lists, click **New** on the Epic related list.
- From within an epic, enter the project name in the Project field on the detail page.

Create and Assign Programs

A program is a collection of projects that work together.

USER PERMISSIONS NEEDED

To use create and assign programs:	Agile Accelerator User OR Agile Accelerator Admin
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Create programs from the Programs tab.

1. On the Programs list view, click **New**.
2. Enter a Program Name and, optionally fill out any other fields.
3. Click **Save**.

From the program's detail page, you can see details about related projects, open activities, and program health.

To assign a project to a program, there are two options.

- From the program's related lists, click **New** on the Project related list.
- From within a project, enter the program name in the Program field on the detail page.

Create and Assign Portfolios

A portfolio is a collection of programs and projects that belong together.

USER PERMISSIONS NEEDED

To use create and assign portfolios:	Agile Accelerator User OR Agile Accelerator Admin
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Create portfolios from the Portfolios tab.

1. On the Portfolios list view, click **New**.
2. Enter a Portfolio Name and, optionally fill out any other fields.
3. Click **Save**.

From the portfolio's detail page, you can see details about attachments, open activities, programs, projects, and portfolio health.

Portfolios can include both programs and projects. To assign a Portfolio to a program or project, there are two options.

- From the portfolio's related lists, click **New** on the Program or Project related list.
- From within a project or program, enter the portfolio name in the Portfolio field on the detail page.

Configure Agile Accelerator

Customize your Agile Accelerator experience. Customize some Agile Accelerator pages and add custom values to the Status picklist for work records. Remove Agile Accelerator action overrides and replace them with standard Salesforce behavior. You can also choose which type of email notification users receive when work records change. Finally, use Agile Accelerator on the go by creating bugs and user stories in the Salesforce Mobile App or through a Chrome Extension.

Customize the Status Picklist for Work Records

Agile Accelerator delivers a robust list of work record statuses. If you need a different status or you don't use one in the list, you can customize the Status picklist on work records. It's a two part process that involves editing the Status field on the Work custom object and then adding the values to the Work Status object.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To edit work records: Agile Accelerator User
OR
Agile Accelerator Admin



Warning: When customizing the picklist values, never remove the Closed value or features like the sprints Velocity calculation don't function correctly.

1. From Object Manager in Setup, click **Work**.
2. Click **Fields & Relationships** and search for **Status**.
3. Click **Status**.
4. In the Values list, click **New**.
5. Enter the name of the new value and select one or more work record types where you want it to appear, then click **Save**.

The new values appear in the Values list on the Status picklist field for the Work object.

6. To move your new custom status to a new location in the dropdown list, you must reorder the Status picklist field on the Work object.
 - a. In the Values list, click **Reorder**.
 - b. Select your custom status and use the arrows to change its placement in the list. You can also optionally choose a value as the default value for this picklist.
 - c. Save your changes.

Your changes are now visible from the Status field in a work record. To use this status in your sprints, Kanban board, and other Agile Accelerator screens, you must also add it to the Work Statuses object.

7. To modify the Work Statuses object, click the app picker waffle icon and enter **Work Statuses** in the search box. Click **Work Statuses**.
8. Click **New**.
9. Enter the same name as the picklist value.
10. Enter a sort order.

If you didn't reorder the values in the Status picklist in Object manager, custom picklist values are displayed at the end of the picklist. The sort order controls the order in which the custom values are displayed at the end of the list, sorted by the Order field in ascending order. So a picklist value with the order of 10 appears higher on the list than a value with the order of 20.

11. Select the record types it applies to by moving them from the Available list to the Chosen list.
12. Save your changes.

The new field shows up as picklist values in the Status field on the Work record.



Note: For Agile Accelerator installations completed before June 2015, you may have to manually add the Type and Order fields to the Work status page layout. Salesforce doesn't currently allow managed packages to change page layouts after the initial install.

Customize Your Org's Agile Accelerator Pages

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience. You can use it to customize your org's product tag, team, theme, sprint wall, and work record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To create and save Lightning pages in the Lightning App Builder: Customize Application

To view Lightning pages in the Lightning App Builder: View Setup and Configuration

With the Lightning App Builder, you can rearrange the elements on a Lightning page as you see fit. For example, you can move Chatter to its own tab or add new Lightning components, including custom ones deployed in your org.

You can edit the following Agile Accelerator pages through the Lightning App Builder:

- Product Tag Record Page
- Team Detail Page
- Theme Record Page
- Work Record Page

To access the Lightning App Builder, from Setup, in the Quick Find box, enter **Lightning App Builder**, then select **Lightning App Builder**.



Tip: For pages created in Lightning App Builder, you can also get to the Lightning App Builder from the page you want to edit. Setup gear icon, then select **Edit Page**.

To learn more about using the Lightning App Builder, take the [Lightning App Builder](#) Trailhead module.

SEE ALSO

- [Salesforce Help: Lightning App Builder](#)

Replace Action Overrides

For complete control over the Work object's View, Create, and Edit screen, you can replace the action overrides we have in place. For example, instead of having the standard Agile Accelerator Work page appear when a user clicks View, you can have the View button launch a standard Salesforce Lightning View, a custom Lightning Component, or a custom VisualForce Page.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To change standard fields:

Customize Application



Note: Overrides also apply to programmatic customizations of the same actions. For example, firing the View record event uses the same setting, and performs the same action, as the user clicking View for that record. You can set different override behavior for Salesforce Classic, Lightning Experience, and mobile.

To remove the action overrides delivered with Agile Accelerator:

1. From Setup, click **Object Manager**, then click **Work**.
2. Click **Buttons, Links, and Actions**.
3. For the action you want to override, click the dropdown arrow and select **Edit**.

If Agile Accelerator or another package installed an override for the action, the Salesforce Classic Override Default and Salesforce Classic Override Default fields display the Visualforce page name or the Lightning component. If you don't see those fields, there's no override for this action.



Note: Not all actions and buttons are editable. The most commonly edited Work actions are Clone, Edit, New, and View.

4. Select the behavior for Salesforce Classic, Lightning Experience, and mobile overrides.
5. Save your changes.

SEE ALSO

- [Salesforce Help: Custom Buttons and Links](#)

Configure Email Volume

You can allow users to choose which type of email notification they receive when work records change.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To view notifications settings:	View Setup and Configuration
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To modify notifications settings:	Customize Application
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The notification levels are:

- **Bread & Butter**—The user is notified when added as an Assignee and when other users comment.
- **Meat & Potatoes**—Notifications include everything in Bread & Butter, plus any changes in the status of the work item (the default level).
- **The Whole Enchilada**—Notifications include everything in Meat & Potatoes, plus changes to any major field.

Follow these steps to add the Agile Accelerator Settings tab to each user’s Chatter profile.

1. From Setup, enter Apps in the Quick Find box, then select **Apps**.
2. Click **Edit** next to Profile Self.
3. Select **Settings** and click **Add** to move settings from the Available Tabs to the Selected Tabs column.
4. Click **Save**.



Note: If you’re loading many records and want to suppress email notifications, create an administrative user with “integration” in the username. Emails aren’t sent when managing records when you’re logged in as the “integration” user.

Configure the Email2agile Service

Agile Accelerator sends email notifications to users when work like user stories and bugs is created or changed. If you want the user replies to these emails stored in Chatter, you can configure the Email2agile service.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To configure email services:

Customize Application

1. From Setup, enter Email Services in the Quick Find box, then select **Email Services**.
2. Click **New Email Service**.
3. Enter email2agile in the Email Service Name field.
4. Enter ADM_Email2agile in the Apex Class field.
5. Make sure to check **Active**.
6. Click **Save** and **New Email Address**.
7. Enter a Context User.

It's best to have already created a dedicated user account whose username starts with email2agile@ for this purpose. For example, email2agile@yourcompany.com. That way, the correct user is identified in the Chatter comments.

8. Enter the domain name of your company's email address in the Accept Email From field.
9. For example, if a typical email address at your company looks like john@mycoolstartup.com, you'd enter mycoolstartup.com.
10. Click **Save**.

Create User Stories and Bugs in Salesforce Mobile App

You can customize Agile Accelerator page layouts to make User Stories and Bugs show in your Salesforce mobile app screens.

REQUIRED EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Developer** Editions

USER PERMISSIONS NEEDED

To create global actions: Customize Application


To add User Stories and Bugs to mobile pages, do the following:

1. From Setup, click **Create | Global Actions | Global Actions**.
2. Click **Global Actions** and verify that the Custom_Bug and Custom_Story actions are present.
3. Under Global Actions, click **Publisher Layouts** and edit the Global Layout.
4. Drag the Bug action to the Quick Actions section. Do the same for the Story action.
5. Remove any actions you don't need, such as Poll. If there are more than 5 actions, some can be hidden in an extra dropdown.
6. Click **Save**.
7. Log into your org from your mobile device and verify that the changes are reflected.

The Bug and User Story action icons appear at the bottom of the screen.

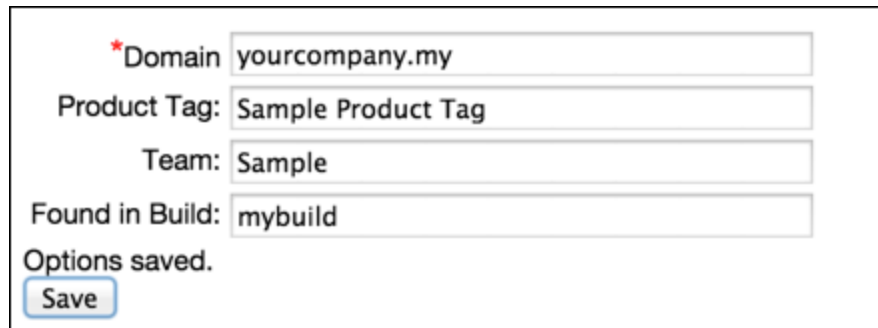
Use the Quick Create Work Record Google Chrome Extension

Create bugs and user stories, quickly and easily, with the free Google Chrome extension for Agile Accelerator.

 **Important:** This extension only works while using the Google Chrome browser.

Install the browser extension, then select the Quick Create icon to add items.

1. With your Google Chrome browser, go to the Chrome Store and search for "Quick Create Work Record" by snair.developer.
2. Click **Add to Chrome**.
3. Configure the extension for your domain.
 - a. If your Salesforce org has My Domain enabled, the domain field requires the text you see before ".salesforce.com".



The screenshot shows a configuration form for the Quick Create Work Record extension. It contains four text input fields with the following labels and values: "Domain" (with a red asterisk) containing "yourcompany.my", "Product Tag" containing "Sample Product Tag", "Team" containing "Sample", and "Found in Build" containing "mybuild". Below the fields, the text "Options saved." is displayed, and a "Save" button is visible at the bottom left.

- b. If your org has a custom domain, then type your company's domain name in the field. For example if your URL looks like "https://MyCompanyName.com" then enter MyCompanyName in the Domain text field.
4. After it's installed, click the plugin icon (to the right of the chrome address bar) and select a tab to create a bug or a user story.