

Enhanced Approval Requests Pro

Release Notes

Version 2.1, Summer 2021
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1 Summary overview (for approvers)

Would you like to have insights about the records you have selected before approving them all at once? The summary overview will display you all relevant statistics about your current selection. This way you can review and verify your selection upfront to make sure you can approve them with absolute certainty!

For example, the screenshot below shows we are approving records where the maximum amount is \$ 1,375.60 and the total \$ 61,932.97. Since this is within our expected acceptable range, we can - without any doubt - approve all 97 expenses at once.

The screenshot displays the Salesforce 'Approval Requests' interface. The main view shows a list of 97 selected expense items under the heading 'Expenses to Approve'. The list includes columns for 'Related To', 'Submitted By', 'Date Submitted', 'Submitter Comments', and 'Date of Purchase'. A summary overlay is open on the right, providing a detailed breakdown of the selected items.

Related To	Submitted By	Date Submitted	Submitter Comments	Date of Purchase
Internet	Susan Wojcicki	05/14/2021, 12:04...	Can you give me so...	Apr 24, 2021
Public transportation	Robin Washington	05/14/2021, 12:04...	Please have a look a...	Apr 17, 2021
Gasoline	Susan Wojcicki	05/14/2021, 12:04...	Please have a look a...	Apr 26, 2021
Car payment	Parker Harris	05/14/2021, 12:04...	Can you give me so...	Apr 26, 2021
Other essentials	Susan Wojcicki	05/14/2021, 12:04...	Can you give me so...	Apr 28, 2021
Toiletries	Robin Washington	05/14/2021, 12:04...	I uregntly need you ...	May 14, 2021
Groceries	Robin Washington	05/14/2021, 12:04...	Please approve.	May 2, 2021
Garbage	Parker Harris	05/14/2021, 12:04...	I uregntly need you ...	May 6, 2021
Sanitation	Susan Wojcicki	05/14/2021, 12:04...	Please have a look a...	May 10, 2021
Water	Susan Wojcicki	05/14/2021, 12:04...	Can you have a look...	Apr 30, 2021
Natural gas	Susan Wojcicki	05/14/2021, 12:04...	Please have a look a...	Apr 26, 2021
Electricity	Parker Harris	05/14/2021, 12:04...	Please approve.	Apr 28, 2021
Life insurance	Parker Harris	05/14/2021, 12:04...	Can you approve thl...	Apr 29, 2021
Out-of-pocket medl...	Susan Wojcicki	05/14/2021, 12:04...	Can you have a look...	May 3, 2021
Health insurance	Susan Wojcicki	05/14/2021, 12:04...	I uregntly need you ...	Apr 24, 2021
Auto insurance	Parker Harris	05/14/2021, 12:04...	Can you give me so...	May 9, 2021
Property tax	Robin Washington	05/14/2021, 12:04...	Please have a look a...	May 5, 2021
Renters insurance	Robin Washington	05/14/2021, 12:04...	Can you approve thl...	May 10, 2021
Homeowners	Robin Washington	05/14/2021, 12:04...	Can you have a look...	Apr 20, 2021
Rent	Parker Harris	05/14/2021, 12:04...	Please have a look a...	Apr 19, 2021
Mortgage	Susan Wojcicki	05/14/2021, 12:04...	Can you approve thl...	Apr 29, 2021
Child care	Susan Wojcicki	05/14/2021, 12:04...	I need approval asap.	Apr 24, 2021

Summary	
Number of Selected Items	97
Date Submitted	Min: 05/14/2021, 12:04 PM; Max: 05/14/2021, 12:04 PM
Date of Purchase	Min: Apr 15, 2021; Max: May 14, 2021
Amount	Sum: \$61,932.97; Avg: \$638.48; Min: \$21.87; Max: \$1,375.60
Discount	Sum: 396.33%; Avg: 4.09%; Min: 8.12%; Max: 22.74%

2 Add more fields of the target object to your list view

Do you need to display more than 5 fields of the target object in your list view? Although you probably want to watch out not overcrowding your list views, we have now increased the number of fields you can configure to 8. This gives you the ability to show even more details about the items you process, so that you can approve them with full confidence!

	Related To	Submitted By	Amount	Discount	VAT Included	Amount In...	Purchase T...	Account	Email	Phone
1	Public transport...	Robin Washington	\$1,024.72	5.92%	✓		11:16:01 AM	Techtral	info@techtra...	(060) 400-0514
2	Gasoline	Parker Harris	\$1,026.27	0.00%	✓		11:16:01 AM	Axtronix	info@axtroni...	(060) 805-5599
3	Car payment	Susan Wojcicki	\$800.18	14.63%	✓		11:16:01 AM	Cyberst	info@cyberst...	(060) 500-4323
4	Other essentials	Susan Wojcicki	\$888.49	23.10%	✓		11:16:01 AM	MetaTech	info@metate...	(060) 657-8759
5	Toiletries	Susan Wojcicki	\$189.41	0.00%	✓		11:16:01 AM	TechZao	info@techza...	(060) 162-1356
6	Groceries	Robin Washington	\$767.22	0.00%	✓		11:16:01 AM	Sample Account...	info@sample...	(061) 228-0984
7	Garbage	Parker Harris	\$201.65	0.00%	✓		11:16:01 AM	Techetit	info@techetti...	(060) 475-0241
8	Sanitation	Susan Wojcicki	\$280.72	19.84%	✓		11:16:01 AM	EngineerGear	info@engine...	(060) 756-0833
9	Water	Susan Wojcicki	\$1,238.11	0.00%	✓		11:16:01 AM	Opticalocal	info@optical...	(060) 447-4748
10	Natural gas	Parker Harris	\$735.67	9.77%	✓		11:16:01 AM	EssecSec	info@essecs...	(061) 331-1642
11	Electricity	Susan Wojcicki	\$980.02	8.76%	✓		11:16:01 AM	QuitmanSabon	info@quitma...	(061) 033-3674
12	Life insurance	Susan Wojcicki	\$13.33	0.00%	✓		11:16:01 AM	TechCity	info@techcit...	(060) 576-3733
13	Out-of-pocket ...	Parker Harris	\$1,199.52	0.00%	✓		11:16:01 AM	TechRich	info@techric...	(060) 289-4848
14	Health insurance	Robin Washington	\$1,404.26	0.00%	✓		11:16:01 AM	HyperTech	info@hypert...	(060) 323-0124
15	Auto insurance	Robin Washington	\$573.93	1.74%	✓		11:16:01 AM	Techtral	info@techtra...	(061) 107-0777
16	Property tax	Robin Washington	\$191.84	0.00%	✓		11:16:01 AM	Axtronix	info@axtroni...	(061) 330-2740
17	Renters insurance	Robin Washington	\$920.30	23.38%	✓		11:16:01 AM	Cyberst	info@cyberst...	(061) 199-5841

3 Configure you Approval Component more easily (for admins)

Earlier, we have added the ability to configure which list view to show on the Approval Request Component. In this release we have made the component configuration via the App Builder easier for the administrator by making it possible to select an active list view via a dropdown menu. So, no more hassle looking up the developer name of list views in Setup!

Activation... Save

Page > Items to Approve (enhanced)

List View

Cases to Approve

- ✓ Cases to Approve
- Items to Approve
- Submitted Pending Items

Hide component if there are no items to approve

✓ Set Component Visibility

Filters

4 Other improvements

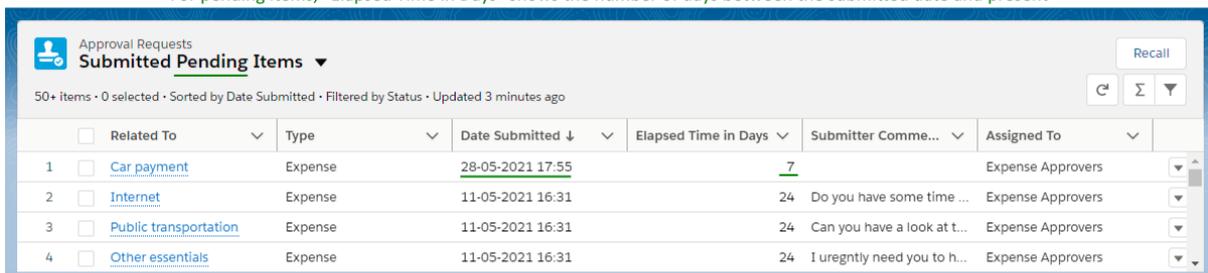
4.1 Display of “Submitted By”

We had discovered that in some rare cases an incorrect name of the submitter was displayed in the list view. We have improved the list view to always display the correct submitter.

4.2 “Days Pending” renamed to “Elapsed Time in Days”

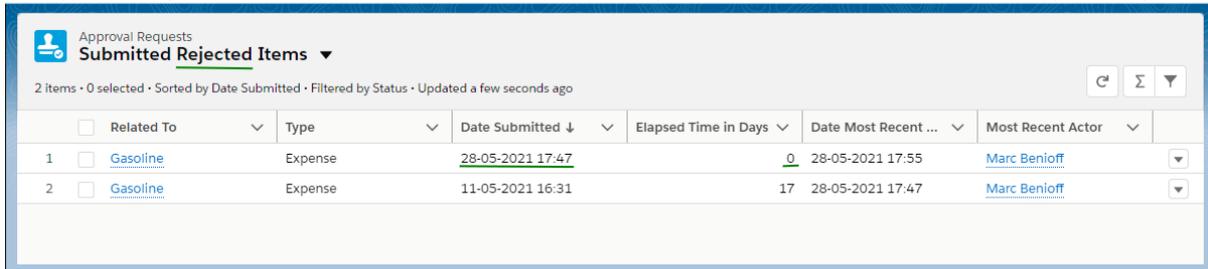
After we have added the ability for submitters to track their approved and rejected items, the existing field “Days Pending” made no sense as these items are not pending anymore. Therefore, we have renamed the field to “Elapsed Time in Days”. In case of pending items, it shows the number of days between the submitted date and present. Otherwise, it shows the number of days between the submitted date and the date of approval or rejection.

For pending items, "Elapsed Time in Days" shows the number of days between the submitted date and present



Related To	Type	Date Submitted	Elapsed Time in Days	Submitter Comments	Assigned To
Car payment	Expense	28-05-2021 17:55	7		Expense Approvers
Internet	Expense	11-05-2021 16:31	24	Do you have some time ...	Expense Approvers
Public transportation	Expense	11-05-2021 16:31	24	Can you have a look at t...	Expense Approvers
Other essentials	Expense	11-05-2021 16:31	24	I uregntly need you to h...	Expense Approvers

For approved or rejected items, "Elapsed Time in Days" shows the number of days between the submitted date and the date of approval or rejection



Related To	Type	Date Submitted	Elapsed Time in Days	Date Most Recent	Most Recent Actor
Gasoline	Expense	28-05-2021 17:47	0	28-05-2021 17:55	Marc Benioff
Gasoline	Expense	11-05-2021 16:31	17	28-05-2021 17:47	Marc Benioff

4.3 Improved popover user experience

Earlier we have added popover functionality to the list views, so that users can get additional information about referenced records by hovering over them. In this release we have updated the field labels on the popover to match with the actual labels on the compact layout. Also, we have repositioned the popover, so it will also display correctly when a table cell value is truncated. The improvements lead to a better user experience.

The screenshot shows a Salesforce list view with a table of records. The table has columns: Assigned..., Account, Email, Phone, Credit C..., and VAT Included. A popover is displayed over the 'Account' column of the record 'Account for Entitlements'. The popover contains the following information:

Account for Entitlements	
Type	Technology Partner
Phone	+31 454 576 247
Website	https://accountforentitl...
Account Owner	Marc Benioff
Account Site	HQ
Industry	Technology