

# Enhanced Approval Requests Pro

## Release Notes

Version 2.15, Summer 2023  
Last updated: May 26, 2023

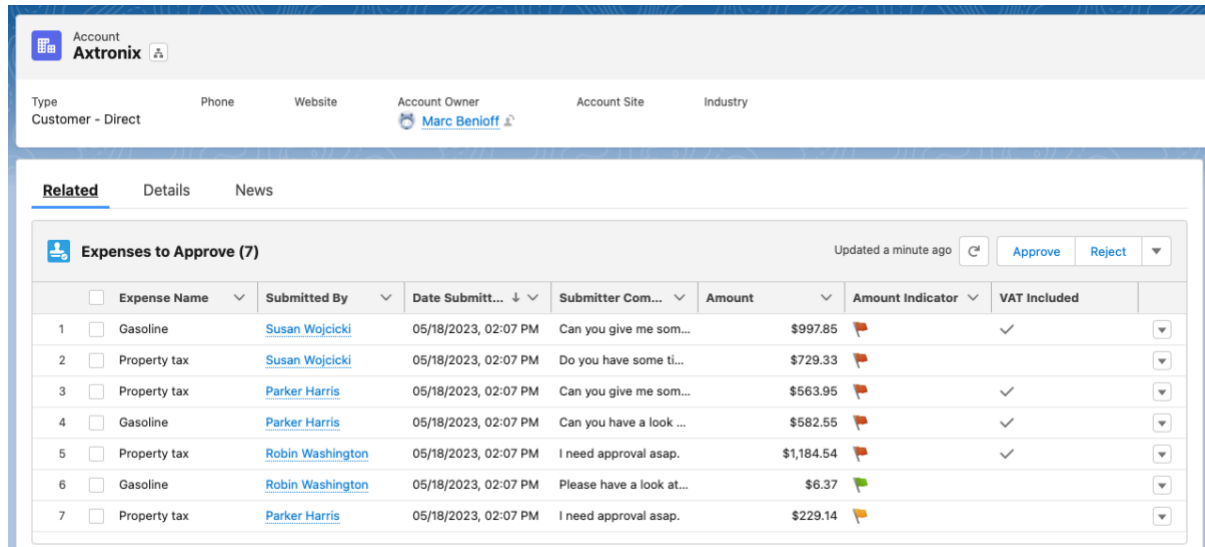
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## 1 Manage related approval requests on Lightning record pages

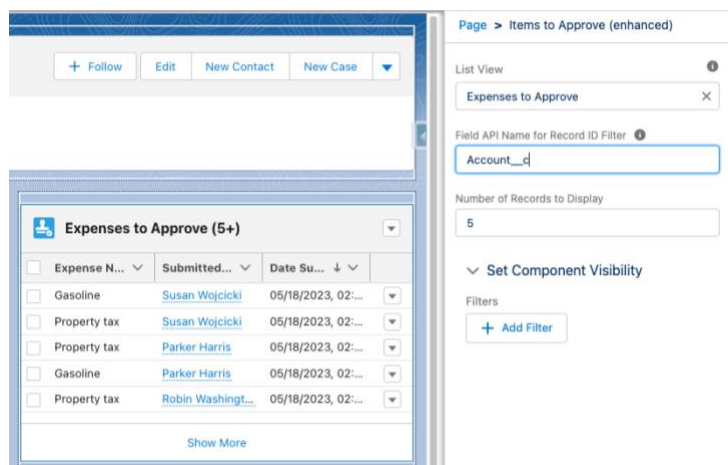
Introducing the new Approval Requests component, designed to enhance your experience with the Enhanced Approval Requests Pro app. With this latest update, you can now display all approval requests related to a specific object directly on the Lightning record page of its parent object.

Let's say you have an object called Expense, which has a lookup field to the Account object. In such cases, it's incredibly useful to have a consolidated view of all approval requests associated with the expenses of a particular account.



To accomplish this, we have introduced a new App Builder component that resembles a standard related list. By adding the Approval Requests component to the Lightning record page of the parent object (in this case, the Account object), you can conveniently view and manage all approval requests tied to the expenses linked to that account.

To configure the component, simply place it on the Lightning record page of the parent object. The component will automatically retrieve and display the relevant approval requests, similar to how a related list displays associated records. This provides you with a seamless and intuitive way to monitor and take action on approval requests within the context of the parent object.



For detailed instructions on configuring and leveraging this powerful feature, please refer to chapter 6.2 of the [configuration guide](#). This chapter provides step-by-step instructions and additional insights to help you make the most of the Approval Requests component.

## 2 Add up to ten fields of the target object to your list view

Do you need to display more than 8 fields of the target object in your list view? Although you probably want to watch out for not overcrowding your list views, we have increased the number of fields you can configure to 10. This gives you the ability to show even more details about the items you process, so that you can approve them with full confidence!

	Relate...	Submit...	Assig...	Amount	A	VA...	Accou...	Catego...	Email	Date of Pu...	Disco...	Prio...	Phone	
1	<input type="checkbox"/>	Out-of-po...	Can you hav...	Marc Benioff	\$207.02		<input checked="" type="checkbox"/>	TechCity	Other Expen...	info@techcity.com	Apr 30, 2023	0.00%	Medium	(060) 140-1369
2	<input type="checkbox"/>	Auto insur...	I urgently ne...	Marc Benioff	\$26.13		<input checked="" type="checkbox"/>	HyperTech	Meals & Ent...	info@hypertech...	Apr 28, 2023	9.50%	High	(060) 902-0627
3	<input type="checkbox"/>	Property tax	Can you app...	Marc Benioff	\$201.49		<input checked="" type="checkbox"/>	Techtral	Employee Be...	info@techtral.com	Apr 23, 2023	0.00%	Medium	(060) 794-5207
4	<input type="checkbox"/>	Renters ins...	Do you have...	Marc Benioff	\$257.19		<input checked="" type="checkbox"/>	Axtronix	Education an...	info@axtronix.com	Apr 27, 2023	0.00%	Low	(061) 037-4697
5	<input type="checkbox"/>	Homeown...	I need appro...	Marc Benioff	\$224.10		<input checked="" type="checkbox"/>	Cyberst	Contractors	info@cyberst.com	May 11, 2023	0.00%	High	(060) 515-6622
6	<input type="checkbox"/>	Rent	Can you hav...	Marc Benioff	\$1,055.64		<input checked="" type="checkbox"/>	MetaTech	Car & Truck ...	info@metatech.c...	May 15, 2023	0.00%	Medium	(061) 097-0159
7	<input type="checkbox"/>	Mortgage	Can you hav...	Marc Benioff	\$1,186.50		<input checked="" type="checkbox"/>	TechZao	Advertising	info@techzao.com	Apr 26, 2023	0.00%	Low	(060) 705-9782
8	<input type="checkbox"/>	Child care	Please appr...	Marc Benioff	\$645.35		<input checked="" type="checkbox"/>	Sample Ac...	Utilities	info@sampleacc...	May 14, 2023	14.84%	High	(060) 756-2886
9	<input type="checkbox"/>	Alimony p...	Do you have...	Marc Benioff	\$507.79		<input checked="" type="checkbox"/>	Techettit	Travel	info@techettit.co...	Apr 23, 2023	0.00%	Medium	(060) 581-2166
10	<input type="checkbox"/>	Child supp...	Can you hav...	Marc Benioff	\$1,318.55		<input checked="" type="checkbox"/>	EngineerG...	Supplies; Tra...	info@engineerge...	May 11, 2023	19.51%	Low	(060) 990-3142

See chapter 5.2 of the [configuration guide](#) to learn how to make the extra fields available.

## 3 Fine-tune list views by predefining object field filters

In addition to quick filters, you can now also apply up to three type (object) field filters on a list view, so that you can create more specific approval list views. In case of a Date or DateTime field, you can specify a specific date or a date literal (such as “THIS\_MONTH” or “LAST\_N\_DAYS:n”) as filter value.

▼ Filters	
Filter On Perspective	Assigned to Running User
Filter On Approval Status	Pending
Filter On Type	Case
Filter On Approval Process Name	
Type Field Filter 1	Priority
Type Field Filter 2	Case Origin
Type Field Filter 3	Created Date
Include Items Assigned Directly	<input checked="" type="checkbox"/>
Include Items Assigned Via Queues	<input checked="" type="checkbox"/>
Include Items As Delegated Approver	<input type="checkbox"/>
Include Items Assigned To Any User	<input type="checkbox"/>
Filter On Type Field Filter 1	High
Filter On Type Field Filter 2	Web
Filter On Type Field Filter 3	LAST_N_DAYS:45

Case Origin	Case Status	Status
Web	Working	Pending
Web	Working	Pending
Web	New	Pending
Web	Working	Pending
Web	Escalated	Pending
Web	New	Pending
Web	Escalated	Pending
Web	New	Pending

**Quick Filters**

Assigned To

Me

My Queues

Users for whom I am the Delegated Approver

Approver

Any User

Type

Case

Case Origin

Web

Priority

High

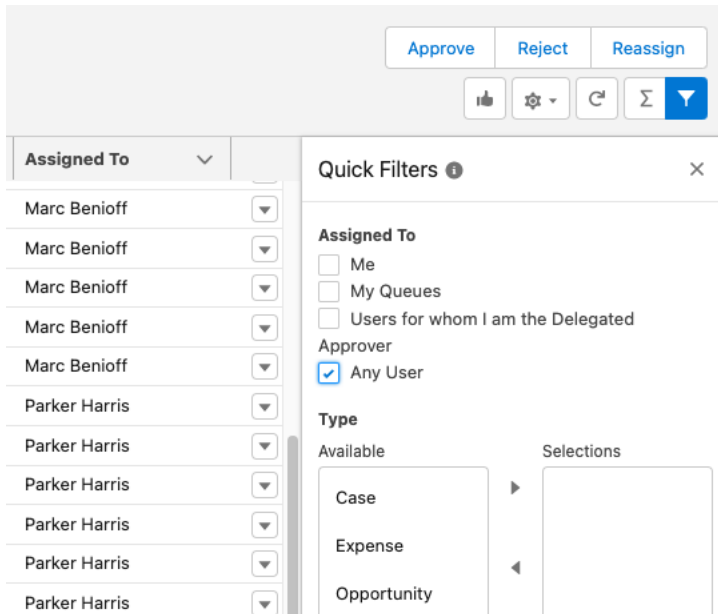
Date/Time Opened

LAST\_N\_DAYS:45

For configuration details and considerations, see chapter 5.4 of the [configuration guide](#).

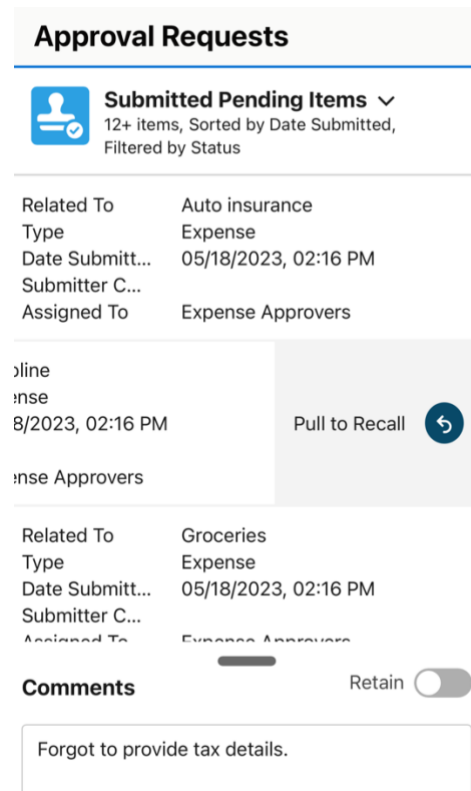
## 4 View approval requests assigned to any user

The possibility to view and manage approval requests assigned to any user was already available for system administrators. As of now, the “Assigned To Any User” filter setting can be made available also for other users. This for example allows approval managers to keep an eye on approval requests assigned to team members, preventing that any request falls into obscurity. For configuration details, see chapter 8 of the [configuration guide](#).



## 5 Recall submitted requests on Mobile

For approvers it was already possible to approve or reject requests via the Salesforce mobile app, using swipe functionality. As of now, a submitter can also easily recall a submitted request. This might for example be handy when you submitted a request and realize you forgot to provide some important details.





## 6 Bug fixes

We have fixed a couple of small bugs:

- You can now navigate to a record page without necessarily displaying the “Related To” column.
- You can now show both the Approval Status and the record Status (such as Case Status) at the same time.
- The table body now neatly aligns with the table header, resulting in a visually more appealing and cohesive layout.