

Enhanced Approval Requests Pro

Release Notes

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Table of Contents

1	<i>Change Default Sorting of Public Approval List Views</i>	2
2	<i>Load up to 2000 Approval Requests without scrolling down</i>	3
3	<i>Streamlined List View Selection and Navigation</i>	3
4	<i>Manage Approval Requests with Multiple Currencies.....</i>	4
5	<i>Bug Fixes and UI Improvements.....</i>	4

1 Change Default Sorting of Public Approval List Views

Approval requests are sorted by the Date Submitted in descending order by default, showing the most recent submissions at the top of the list view. Administrators now have the flexibility to configure the default sorting criteria for public approval list views on desktop. This configuration includes selecting a specific field and the sorting direction (ascending or descending). The sorting criteria can be based on various Approval Request fields, such as 'Related To', 'Submitted By', 'Assigned To', etc. Additionally, when filtering approval requests related to a specific object using the 'Filter On Type' filter, administrators can also sort based on fields specific to the chosen object type.

The screenshots below show an example of how you can configure a list view for pending approval requests associated with cases, sorted by case priority in descending order. This configuration streamlines the approval process by allowing approvers to prioritize and address the most critical case-related approval requests first.

EAR - List View Detail Edit Delete Clone

Label	Cases to Approve	EAR - List View Name	Cases_To_Approve
Custom Label for Translated Title	earpro__casesToApprove	Is Active	<input checked="" type="checkbox"/>

Filters

Filter On Perspective	Assigned to Running User	Include Items Assigned Directly	<input checked="" type="checkbox"/>
Filter On Approval Status	Pending	Include Items Assigned Via Queues	<input checked="" type="checkbox"/>
Filter On Type	Case	Include Items As Delegated Approver	<input type="checkbox"/>
Filter On Approval Process Name		Include Items Assigned To Any User	<input type="checkbox"/>

Column Visibility and Order

Related To	<input checked="" type="checkbox"/>	Order - Related To	1
Type	<input type="checkbox"/>	Order - Type	
Submitted By	<input checked="" type="checkbox"/>	Order - Submitted By	2
Date Submitted	<input checked="" type="checkbox"/>	Order - Date Submitted	3
Type Field 1	Subject	Order - Type Field 1	5
Type Field 2	Case Origin	Order - Type Field 2	6
Type Field 3	Status	Order - Type Field 3	7
Type Field 4	Priority	Order - Type Field 4	
Type Field 5	Priority Number	Order - Type Field 5	

Sorting

Sort By	Type Field 5	Sort Direction	Descending
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Approval Requests **Cases to Approve** Approve Reject Reassign

40 items • 0 selected • Sorted by Priority Number • Filtered by Assigned To, Type • Updated a few seconds ago

	Related To	Submitted By	Date Submitted	Subject	Case Origin	Case Status	Priority	Priority Number
1	00001046	Parker Harris	11/09/2023, 0...	Natural gas st...	Web	New	High	3
2	00001032	Robin Washin...	11/09/2023, 0...	Renters insur...	Web	Escalated	High	3
3	00001101	Robin Washin...	11/09/2023, 0...	Internet stolen	Phone	Escalated	High	3
4	00001074	Robin Washin...	11/09/2023, 0...	Garbage lost	Phone	New	Medium	2
5	00001086	Parker Harris	11/09/2023, 0...	Garbage lost	Phone	New	Medium	2
6	00001072	Robin Washin...	11/09/2023, 0...	Homeowners ...	Phone	New	Medium	2
7	00001085	Susan Wojcicki	11/09/2023, 0...	Garbage not f...	Email	New	Medium	2
8	00001060	Parker Harris	11/09/2023, 0...	Sanitation lost	Web	Working	Low	1
9	00001087	Robin Washin...	11/09/2023, 0...	Water stolen	Email	New	Low	1
10	00001073	Parker Harris	11/09/2023, 0...	Natural gas lost	Email	Escalated	Low	1
11	00001059	Susan Wojcicki	11/09/2023, 0...	Renters insur...	Web	Escalated	Low	1
12	00001045	Robin Washin...	11/09/2023, 0...	Other minimu...	Web	Escalated	Low	1



It is crucial to understand that default sorting for most fields is effective only when all approval requests, meeting the configured filter criteria, are fully loaded. In cases where this is not initially true, users must scroll down to load additional items. Sorting across any field column becomes feasible only once all approval requests are loaded. For more details, please refer to section 5.5 of the [configuration guide](#). For approvers who often deal with over 50 pending approval requests, it's advisable to consider raising the query limit, which can now be set to as high as 2000. This adjustment allows for immediate loading of up to 2000 requests. Further details are available in the following section.

2 Load up to 2000 Approval Requests without scrolling down

By default, when a user accesses a list of approval requests on desktop, the application initially retrieves a maximum of 50 approval request items. If scrolling down the page, the next batch of 50 items will be loaded, if available. Previously, there was the option to adjust the number of items loaded per batch to 100, 150, or 200. Now, you also have the flexibility to choose from higher limits such as 500, 1000, or 2000.

Increasing this query limit can be particularly useful when approvers are often dealing with a large volume of pending approval requests, as it allows them to quickly sort the requests based on any field. However, it's important to note that a higher query limit may result in longer initial load times.

For instructions on how to change the query limit, please refer to Chapter 8 of the [configuration guide](#).

3 Streamlined List View Selection and Navigation

We have enhanced the user experience for switching between list views on desktop, by introducing improvements to the list view selector and the navigation logic. Notably, we have implemented two key enhancements:

Remembering Sorting Preferences: Now, the application will remember the sorting criteria previously chosen for a specific list, even when users switch between list views or log back in. This ensures that users can effortlessly pick up where they left off, with their preferred sorting order intact.

Automatic Refresh for Approval Requests: We've introduced automatic refresh functionality for the Approval Requests tab. Previously, when an approver transitioned from a list of pending approval requests to an individual approval request page, took action (e.g., approving or rejecting the request), and returned to the Approval Requests tab, the list did not refresh. Consequently, it would still display the previously approved or rejected request. This issue has been addressed, and the Approval Requests tab now automatically refreshes upon navigation, providing users with up-to-date information.

These enhancements enhance the efficiency and usability of our app, ensuring a smoother experience for submitters and approvers.

4 Manage Approval Requests with Multiple Currencies

If your organization has activated the Multiple Currencies feature in Salesforce, currency fields within a record will display two values: the original amount in the record's specified currency and, in brackets, the equivalent amount in the user's currency. This functionality extends to approval processes involving objects with one or more currency fields. In such scenarios, the approval list view will now also present monetary values in both the record's currency and the user's currency. Additionally, when applying filters to a currency field, users can input minimum and maximum values in their own currency. The application automatically accounts for conversion in these instances. This functionality also applies to the summary panel, where the total, average, minimum, and maximum values of selected currency field items are displayed in the user's currency.

The screenshot displays the 'Approval Requests' interface for 'Expenses to Approve'. The main table lists 18 items, each with a checkbox, a category (e.g., Mortgage, Alimony payments), the submitter (Robin Washington), a comment, and an amount field. The amount field for each row shows two values: the original currency and the user's currency (USD). For example, the first row shows 'EUR 786.58 (USD 836.79)'. A red box highlights the 'Amount' column header and the values in the first row. On the right, the 'Quick Filters' panel is visible, with a red box highlighting the 'Amount' filter section, which includes 'Min' and 'Max' input fields. The 'Min' field contains the value '\$800.00'.

Related To	Submitted By	Submitter Comments	Amount
<input type="checkbox"/> Mortgage	Robin Washington	Please have a look at this r...	EUR 786.58 (USD 836.79)
<input type="checkbox"/> Alimony payments	Robin Washington	I need approval asap.	GBP 1,004.50 (USD 1,225.0...)
<input type="checkbox"/> Student loan payments	Robin Washington	I need approval asap.	GBP 1,106.38 (USD 1,349.25)
<input type="checkbox"/> Internet	Robin Washington	Please approve.	USD 891.96
<input type="checkbox"/> Gasoline	Robin Washington	Do you have some time to l...	USD 856.14
<input type="checkbox"/> Groceries	Robin Washington	Please approve.	USD 943.23
<input type="checkbox"/> Homeowners	Robin Washington	Please have a look at this r...	EUR 786.23 (USD 836.42)
<input type="checkbox"/> Public transportation	Robin Washington	Please have a look at this r...	USD 1,044.73
<input type="checkbox"/> Toiletries	Robin Washington	Please approve.	USD 991.38
<input type="checkbox"/> Natural gas	Robin Washington	I urgently need you to have ...	USD 960.61
<input type="checkbox"/> Rent	Robin Washington	Can you approve this reque...	EUR 812.43 (USD 864.29)
<input type="checkbox"/> Water	Robin Washington	I urgently need you to have ...	EUR 1,281.20 (USD 1,362.98)
<input type="checkbox"/> Health insurance	Robin Washington	Can you approve this reque...	USD 1,007.69
<input type="checkbox"/> Auto insurance	Robin Washington	I urgently need you to have ...	USD 890.53
<input type="checkbox"/> Cell phone	Robin Washington	Please approve.	USD 1,177.46
<input type="checkbox"/> Groceries	Robin Washington	Can you approve this reque...	USD 1,015.35
<input type="checkbox"/> Garbage	Robin Washington	Can you have a look at this ...	GBP 803.68 (USD 980.10)
<input type="checkbox"/> Homeowners	Robin Washington	Can you give me some feed...	USD 1,003.20

5 Bug Fixes and UI Improvements

We have implemented a couple of small bug fixes and UI improvements:

- Previously, if an administrator deleted or deactivated a list view set as the default, users would encounter an error message that was less than user-friendly. Now, in such cases, users will receive a more informative and friendly message, guiding them to select an active list view or to create a new one.
- If your Salesforce org has multiple languages enabled, there is the possibility to use a custom label as the title for a public approval list view (see section 5.2 of the [configuration guide](#)). This makes it easier to use one list view configuration for users with different languages. Previously, if an administrator provided an invalid custom label, the list view would fail to render and display an unattractive error message. However, with our recent improvements, even when an invalid custom label is used, the list view will still render, displaying the standard list view title as provided.
- We've introduced several UI enhancements to provide a more polished and user-friendly interface. These improvements include increased spacing between the scroll bar and the row action buttons, a refined visual style for the list view controls menu, and centered alignment for the loading spinner and informational messages.