

Enhanced Approval Requests Pro

Release Notes

Version 2.22, Summer 2024
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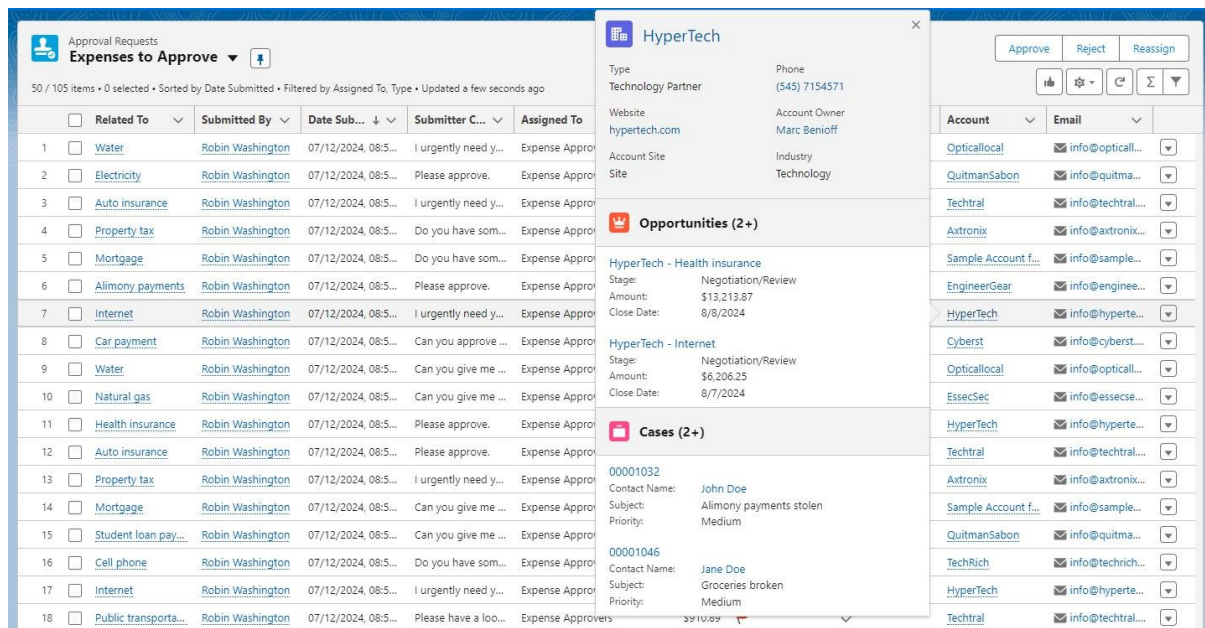
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1 View Related Records in Lookup Popovers

We are excited to announce a powerful new feature in the latest release of Enhanced Approval Requests Pro: the ability to view related records directly within lookup popovers.

Approvers often need quick access to information from related records when deciding on approval requests. Previously, lookup popovers displayed fields from the referenced record. Now, they can also show records from any object related to that referenced record, via configurable related lists. This enables approvers to instantly view all relevant related data, making the approval process faster and more informed.

For example, if your organization has an approval process on the Order object, approvers likely want to view the related order products before approving or rejecting order approval requests. Or it could be that you have an approval process on an object which has a lookup field to Account. Approvers might want to check any other records related to an account, such as opportunities or cases. They can now simply hover over the concerning lookup field and view all the relevant information in a comprehensive view, without having to leave the approval requests page.



Key benefits:

- **Increased Efficiency:** Quickly access all relevant information without multiple clicks and page loads.
- **Comprehensive Context:** Instantly view any related records within the popover.
- **User-Friendly Experience:** Seamlessly gather all necessary data directly from the approval requests interface.

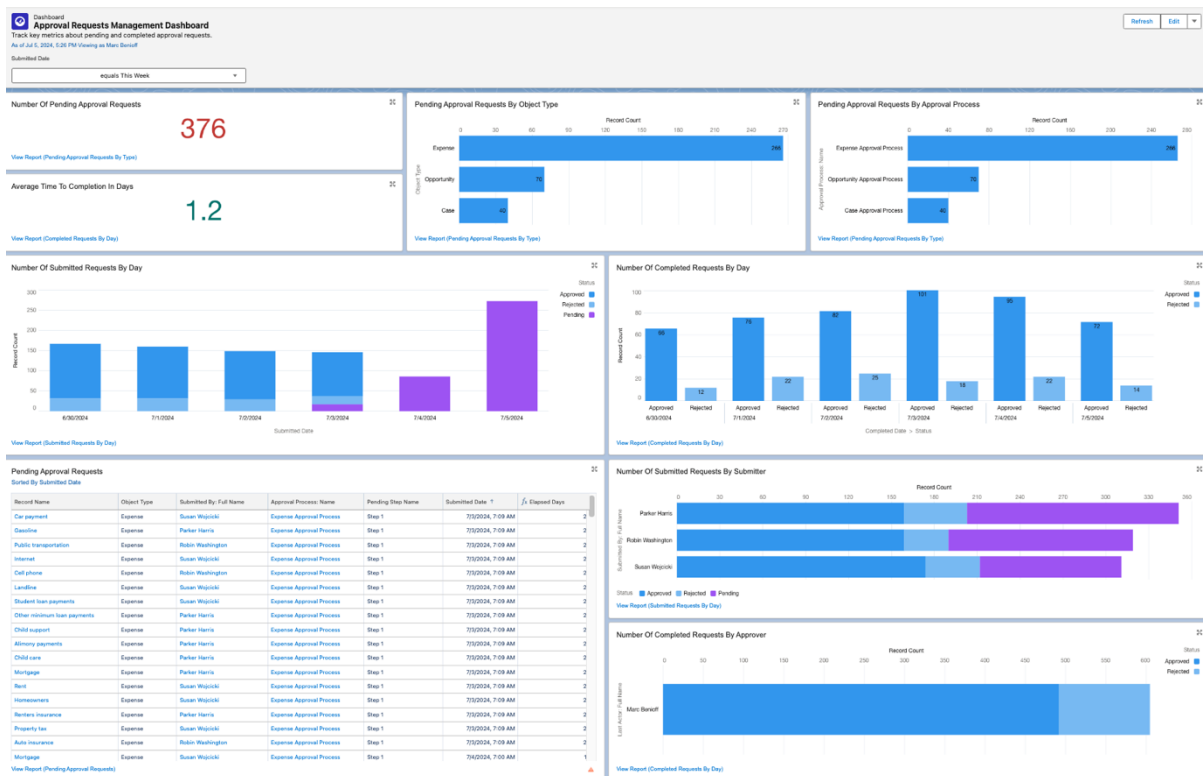
To learn how you can configure related lists for approval request lookup fields in your org, check out chapter 5 of the [configuration guide](#).

2 Track approval metrics with Approval Management Dashboard

We received feedback from multiple customers highlighting the need for a dashboard to track and manage key approval process metrics effectively. In response, we have included Approval Request custom report types, sample reports, and a comprehensive dashboard in the latest version of the Enhanced Approval Requests Pro package.

The Approval Requests Management Dashboard provides a detailed overview of approval processes, enabling you to track metrics like:

- **Number of Pending Approval Requests:** Track the total number of pending approval requests across various dimensions such as object type and approval process.
- **Average Time to Completion:** Monitor the average time taken to complete an approval request.
- **Requests Submitted Over Time:** Analyze submission rates of approval requests over various time frames (e.g. daily, weekly, or monthly) and their current status.
- **Longest Pending Approval Requests:** Identify approval requests that have been pending the longest.
- **Top Request Submitters and Approvers:** Determine which users submit the most requests and who the top approvers are.



This dashboard and the accompanying reports are designed as examples to showcase the capabilities of the included report types. We recommend customizing the dashboard components and underlying source reports to align with your organization's approval processes and focus on the metrics that are most important to your operations.

3 Configure mass submit for approval in fewer steps

Enhanced Approval Requests Pro includes the ability to add a “Submit for Approval” button to an object’s list view. This feature allows users to select multiple records from the list and to submit them for approval in one go. Previously, configuring this functionality involved creating a Visualforce page. Now, this process has been simplified and using the latest technology. The mass submit action can simply be activated by referencing a flow URL, reducing the number of configuration steps. Making mass submit functionality available for submitters is now easier than before!

The detailed steps for adding the mass “Submit for Approval” button are described in chapter 9 of the [configuration guide](#).

4 Assign a user or queue upon mass submit for approval

Some approval processes require submitters to manually select an approver during submission. In such cases, the submitter should be able to choose either a user or a queue. Previously, the mass submit functionality only supported selecting a user. Now, submitters also have the option to select a queue.

Submit 50 out of 50 Expenses for Approval

✓ Able to submit 50 out of 50 Expenses. Manually select an approver for 50 Expenses.

Comments

* Approver

Search Queues...

Users

Queues

Cancel Submit for Approval



5 Bug Fixes and User Experience Enhancements

- We have upgraded the API version of all code and Lightning components in the package to the latest Salesforce API version. This makes sure Enhanced Approval Requests Pro is up to date with the latest security measures.
- We've introduced several UI enhancements to provide a more polished and user-friendly interface.