

Enhanced Approval Requests Pro

Release Notes

Version 2.3, Summer 2021
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1 Approved/rejected list views for approvers

As an approval manager, you might want to have a look at approval requests you approved or rejected in the past. This already was possible for submitters. Now, as an administrator, you can create this type of list views also for approvers, by setting the filter on perspective to “Assigned to Running User” and the filter on approval status to “Approved” or “Rejected”. Of course, it can be combined with a filter on object type. This gives approvers the possibility to – for example – view their approved opportunities in a specific period and in the summary panel the total opportunity amount by selecting the concerning items.

	Related...	Type	Submitt...	Date ...	Elapsed...	Submitt...	Date M...	Most R...	Status
1	00001082	Case	Parker Harris	07/29/2021, ...	1	I need appro...	07/30/2021, ...		Approved
2	00001064	Case	Parker Harris	07/29/2021, ...	8	Can you app...	08/06/2021, ...		Approved
3	00001061	Case	Robin Washi...	07/29/2021, ...	12	Can you hav...	08/10/2021, ...	Looks good!	Approved
4	00001060	Case	Parker Harris	07/29/2021, ...	12	Can you giv...	08/10/2021, ...	Looks good!	Approved
5	HyperTech - ...	Opportunity	Parker Harris	07/29/2021, ...	1	Can you giv...	07/30/2021, ...		Approved
6	HyperTech - ...	Opportunity	Susan Wojci...	07/29/2021, ...	12	Please appr...	08/10/2021, ...	Great job!	Approved
7	Techtral - A...	Opportunity	Robin Washi...	07/29/2021, ...	12	I uregntly ne...	08/10/2021, ...	Perfect, nice!	Approved
8	Rent	Expense	Susan Wojci...	07/29/2021, ...	12	I uregntly ne...	08/10/2021, ...	All good!	Approved
9	Car payment	Expense	Robin Washi...	07/29/2021, ...	12	Please appr...	08/10/2021, ...	All good!	Approved
10	Alimony pay...	Expense	Robin Washi...	07/29/2021, ...	1	Do you have...	07/30/2021, ...		Approved

EAR - List View Detail

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Label	My Assigned Approved Items	EAR - List View Name	My_Assigned_Approved_Items
Custom Label for Translated Title		Is Active	<input checked="" type="checkbox"/>

Filters

Filter On Perspective Assigned to Running User

Filter On Approval Status Approved

Include Items Assigned Directly

Include Items Assigned Via Queues

Include Items As Delegated Approver

Filter On Type

Filter On Approval Process Name

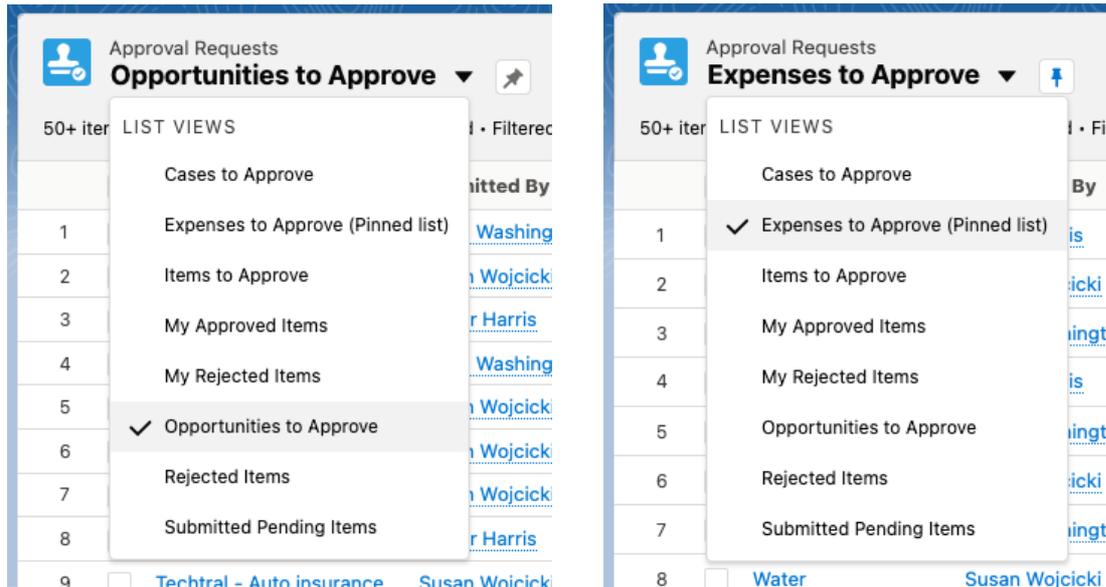
Column Visibility and Order

Related To	<input checked="" type="checkbox"/>	Order - Related To
Type	<input checked="" type="checkbox"/>	Order - Type
Submitted By	<input checked="" type="checkbox"/>	Order - Submitted By
Date Submitted	<input checked="" type="checkbox"/>	Order - Date Submitted
Elapsed Time in Days	<input checked="" type="checkbox"/>	Order - Elapsed Time in Days
Submitter Comments	<input checked="" type="checkbox"/>	Order - Submitter Comments
Assigned To	<input type="checkbox"/>	Order - Assigned To
Most Recent Actor	<input type="checkbox"/>	Order - Most Recent Actor
Date Most Recent Action	<input checked="" type="checkbox"/>	Order - Date Most Recent Action
Most Recent Actor Comments	<input checked="" type="checkbox"/>	Order - Most Recent Actor Comments
Approval Process Name	<input type="checkbox"/>	Order - Approval Process Name
Current Approval Step	<input type="checkbox"/>	Order - Current Approval Step
Approval Status	<input checked="" type="checkbox"/>	Order - Approval Status

2 Pin your favorite list view

Do your users often use a specific list view to view assigned or submitted approval requests? A Sales Manager probably uses the “Opportunities to Approve” most of the times, but for a Financial Controller this might be the “Expenses to Approve” one. Users can now pin their own favorite list view. The pinned list view loads as the default list view when a user clicks the Approval Requests tab.

To pin a list view, click the diagonal grey pin icon. A vertical blue pin icon indicates the pinned list view. To pin a different list view, select a different one and pin it instead.



Note: Pinned list view are per user and don't sync between browsers. If a user clears his/her browser's cache, the pinned list view gets unpinned and the default list view becomes the generic default one (configured under "EAR – General Settings" Custom Metadata Type).

3 Most recent actor comments

It is now possible to include a column in the approval requests table for showing the most recent actor comments. Being able to easily review comments of the most recent actor might be useful in several scenarios, for example:

- In case of a multi-step approval process for a next approver.
- As a submitter when reviewing your submitted approved or rejected requests.
- As an approver when reviewing your assigned approved or rejected requests.

Related To	Type	Date Submitted	Most Recen...	Date Most Recent Action	Most Recent Actor Comments
00001054	Case	07/29/2021, 08:42 AM	Marc Benioff	08/13/2021, 09:17 AM	Can you please specify the Case Reason?
00001052	Case	07/29/2021, 08:42 AM	Marc Benioff	08/13/2021, 09:18 AM	Can you please specify the Case Reason?
00001048	Case	07/29/2021, 08:42 AM	Marc Benioff	08/13/2021, 09:18 AM	Can you please specify the Case Reason?
Techtral - Auto insurance	Opportunity	07/29/2021, 08:42 AM	Marc Benioff	08/13/2021, 09:19 AM	Pleas reduce the discount.
Out-of-pocket medical co...	Expense	07/29/2021, 08:42 AM	Marc Benioff	08/13/2021, 09:22 AM	These expenses exceed your monthly budget.

EAR - List View Detail

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Label	Submitted Rejected Items	EAR - List View Name	Submitted_Rejected_Items
Custom Label for Translated Title	earpro__submittedRejectedItems	Is Active	<input checked="" type="checkbox"/>

Filters

Filter On Perspective	Submitted by Running User	Include Items Assigned Directly	<input type="checkbox"/>
Filter On Approval Status	Rejected	Include Items Assigned Via Queues	<input type="checkbox"/>
Filter On Type		Include Items As Delegated Approver	<input type="checkbox"/>
Filter On Approval Process Name			

Column Visibility and Order

Related To	<input checked="" type="checkbox"/>	Order - Related To	1
Type	<input checked="" type="checkbox"/>	Order - Type	2
Submitted By	<input type="checkbox"/>	Order - Submitted By	
Date Submitted	<input checked="" type="checkbox"/>	Order - Date Submitted	3
Elapsed Time in Days	<input type="checkbox"/>	Order - Elapsed Time in Days	
Submitter Comments	<input type="checkbox"/>	Order - Submitter Comments	
Assigned To	<input type="checkbox"/>	Order - Assigned To	
Most Recent Actor	<input checked="" type="checkbox"/>	Order - Most Recent Actor	4
Date Most Recent Action	<input checked="" type="checkbox"/>	Order - Date Most Recent Action	5
Most Recent Actor Comments	<input checked="" type="checkbox"/>	Order - Most Recent Actor Comments	6
Approval Process Name	<input type="checkbox"/>	Order - Approval Process Name	
Current Approval Step	<input type="checkbox"/>	Order - Current Approval Step	
Approval Status	<input type="checkbox"/>	Order - Approval Status	

Note: If you don't see "Most Recent Actor Comments" and "Order – Most Recent Actor Comments" yet, please add these fields to the page layout of the "EAR – List View" Custom Metadata Type object. See the chapter "Configure list views" in the installation guide for more details.

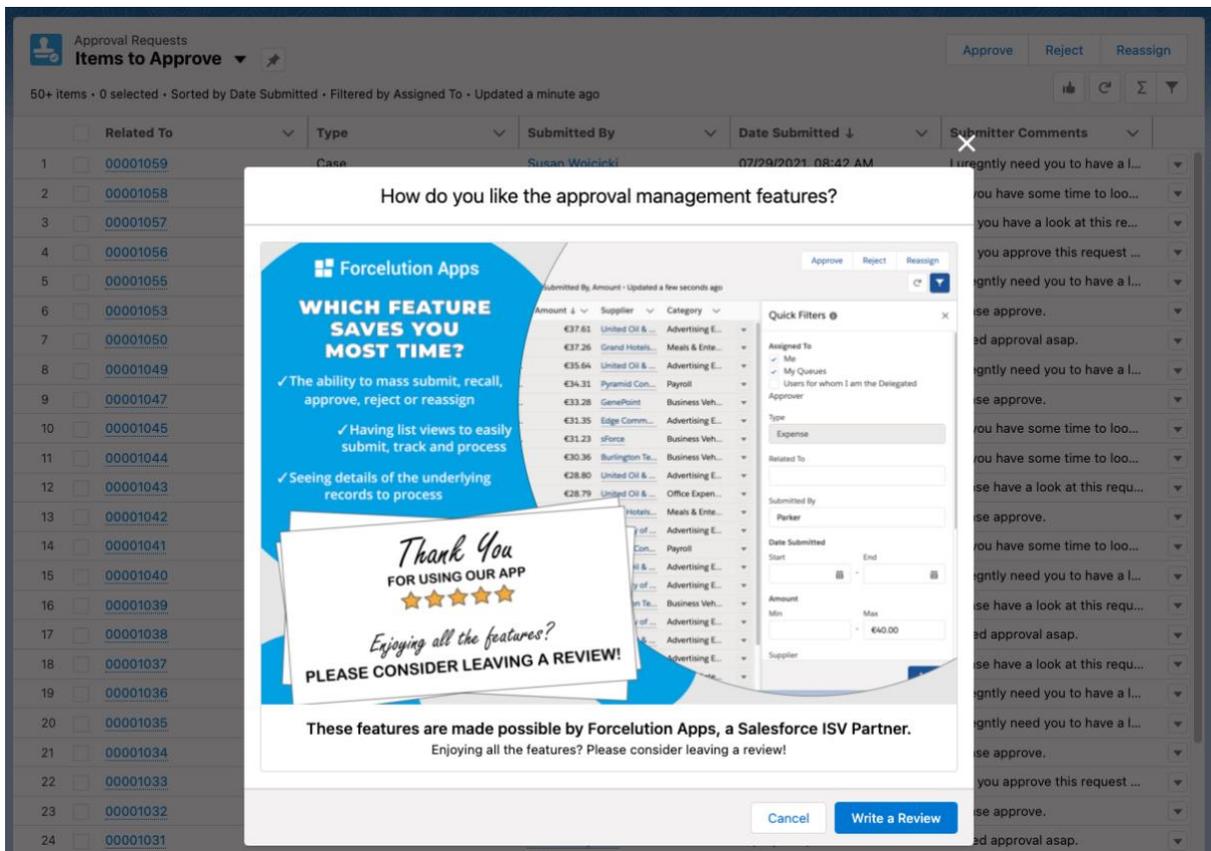
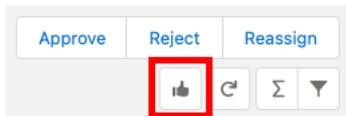
4 Summary panel improvements

We had discovered some small bugs in the Summary panel. Min and max values weren't always displayed correctly if items were selected with a zero value and a percentage field also showed the sum. These bugs are now exterminated.

5 Thumbs up!

Reviews on an AppExchange listing help admins to decide whether a Salesforce app would be a good solution or add-on for their organization. For us, as a Salesforce ISV partner, reviews of our app “Enhanced Approval Requests Pro” are also very important. User feedback helps us with the prioritization of new features and improvements. Of course, we also hope that reviews contribute to more installments of our app.

Therefore, we have added a “Like”-button to the Approval Requests page header. Clicking on it shows a modal with the question how the user likes the approval management features and an action button that links to the review section on our AppExchange listing.



We understand that some of your users do not realize that the approval management functionality concerns an AppExchange app and that they might find this “Like”-button weird or annoying. Therefore, we can easily hide this button again for your organization. Please send us an email if you prefer it to be hidden and we arrange it immediately.