



Release Notes

SUMO 5.7

Release Date: February, 2018

Author: Jason North

We are pleased to announce our newest enhancements to SUMO. This minor release includes a host of new features, optimizations to calendar sync, and improved security. This document contains the most important details regarding this release.

FEATURE UPDATES

SUMO 5.7 minor release includes the following 6 enhancements:

1. Improved Sync for Large Datasets
2. Auto-Complete on the Where Page
3. Auto-Geocode on New Locations
4. Delete Appointment (View) Page
5. Admin Page Segregation
6. Reset Participant Status

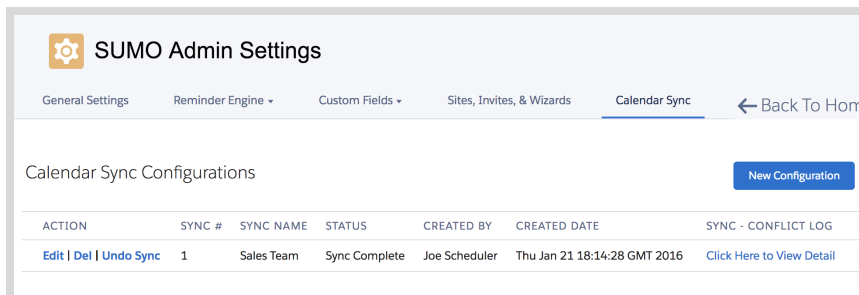




IMPROVED SYNC FOR LARGE DATA SETS

Especially for large enterprise organizations who need to sync large data sets, SUMO Sync has been re-architected to improve performance.

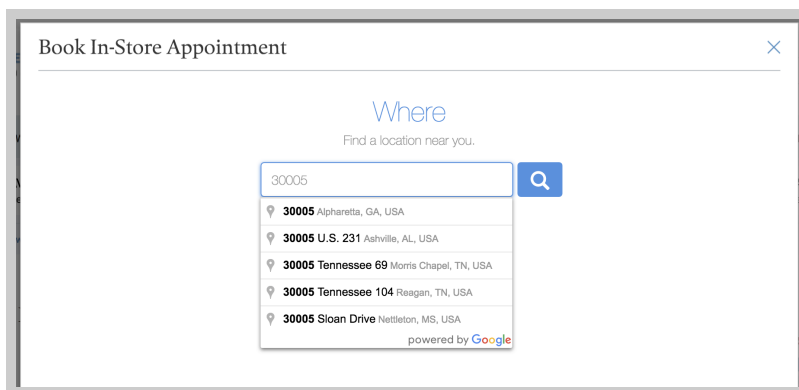
The Administrative experience is the exact same, however, the engine behind the scenes has been completely overhauled.



AUTO-COMPLETE ON THE WHERE PAGE

We've updated the WHERE page in the Online Scheduler, to include auto-complete feature, as shown to the right.

Now users can start typing a city, state, postal code, and Google Maps will help them finish by offering the most likely results for them.



Simply choose the option that you were attempting to type and GO! Saves a ton of time -and- helps avoid typos.



AUTO GEOCODE ON NEW LOCATIONS

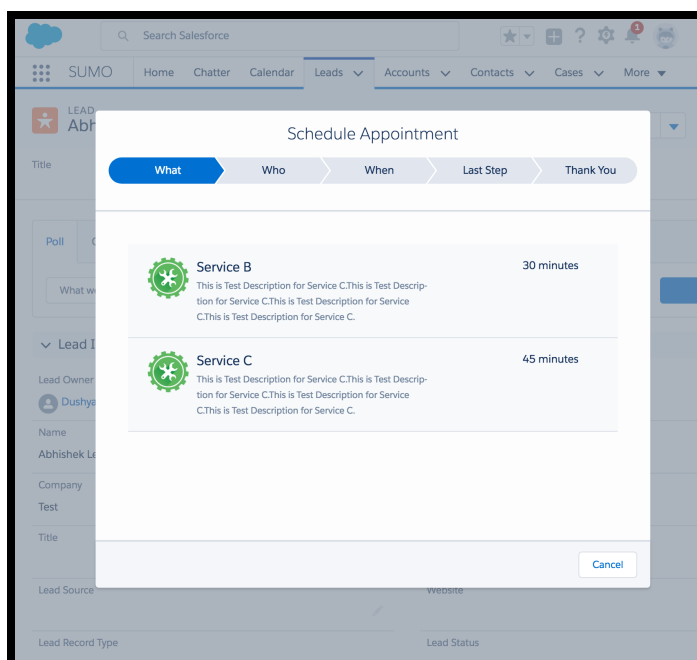
In Lightning Experience, when creating a new location, SUMO will now automatically fetch a locations geocode for you. This may take a minute to process; simply refresh your Location page and see the Flag updated! This will require an Admin to populate a default baseline Zip in Custom Settings.

CONSOLIDATED ADMIN SETTINGS

Site & Invite Edit pages, that control your self-scheduling settings has been split into separate pages. This means SUMO supports even more data per page! This allows larger organizations to self-schedule with even more Locations, Providers & Services.

Admins may have experienced a Visualforce Apex Limit exceeded message; with this enhancement, you should no longer see this error.

Keep in mind this is a system limit and you may still hit it in the future. There are workarounds available, if you should experience this issue, please reach out to Support!



Keep an eye out for continued enhancements for large data organizations.

New Pages:

1. *SendApptInvitePage*
2. *LeadFormPage*
3. *WherePage*
4. *WhatPage*
5. *WhoPage*
6. *WhenPage*



7. *LoginRegPage*
8. *LastStepPage*
9. *ThankYouPage*

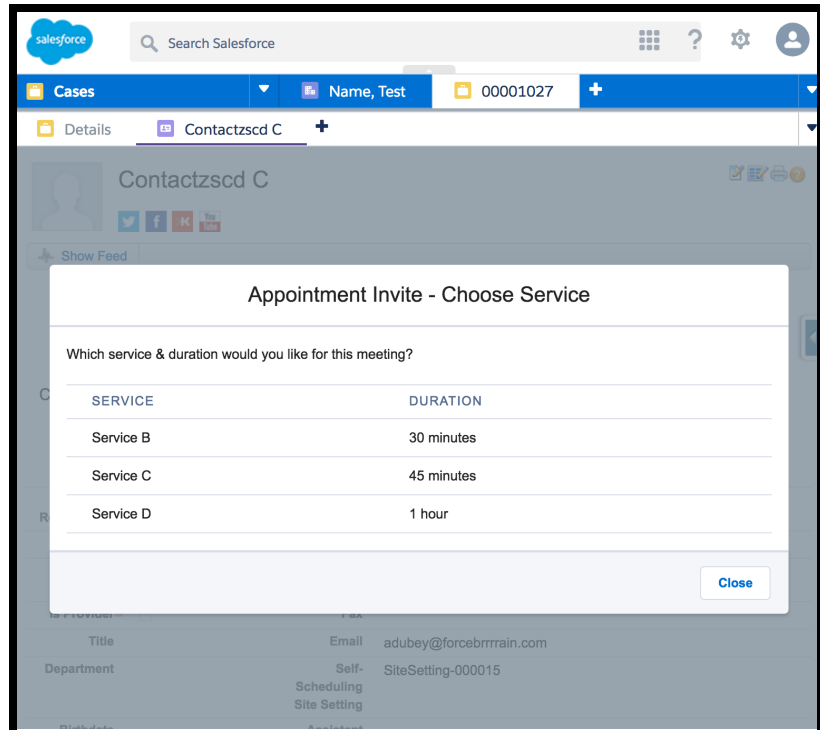
Person Account “BadId” Error Fix

When (a) Self-Scheduling or (b) Manually scheduling a Person Account on a SUMO Appointment, the system would give you a bad Id error.

To ensure data is present for certain order of operations, SUMO requires that Customer / Provider (Contact Lookup) be filled out upon insert of an Appointment Participant.. There are 2 ways in which this fix is implemented.

SUMO now gets the ‘Hidden Contact Id’ from a Salesforce Person Account (is really an Account Id) before insert instead of after.

SUMO will also, automatically fill out the Customer / Provider with the “Dummy Contact” when you associate a Lead





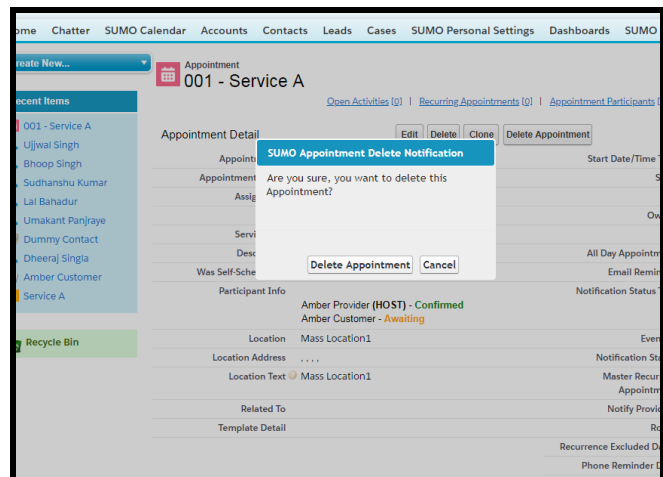
CALENDAR SYNC - RECURRING APPOINTMENTS

Recurring Appointments & Events in Salesforce & SUMO Calendar Sync has been upgraded. The newest revamped Calendar Sync now supports syncing your recurring SUMO Appointments and Salesforce Events.

Delete Appointment (View) Page

To remain compliant with Salesforce new Security requirements, we have removed JavaScript from the “Delete Appointment” SUMO button.

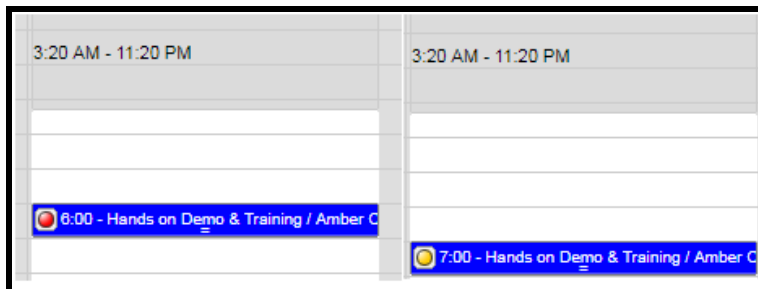
This will redirect to a temporary VF page (that shows your View Appointment page) and a pop up will be imposed on that for additional Appointment Delete Options.





Reset Participant Status

From the SUMO Calendar, when you drag and drop to a new time, SUMO will reset the participants status (so that previously accepted and declined participants) can now submit their attendance based on the new changes.



This only happens from the SUMO Master Calendar, and will not happen when people reschedule by other means, or edit the Appointment directly.

Visually, your light will go back to yellow.



KNOWN ISSUES

We're aware of the following known issues and plan to provide a solution in an upcoming patch or a future release. For updates on any of these items, please [log a case with SUMO Support](#).

ISSUE	DETAIL
Convert SUMO Person Account	When you convert a Lead with SUMO's Person Account, it does not check "Is Personal" checkbox. Please do this as a post create step (on the Contact).
CONSOLE	Only one case Failed (Lead and Contact is working as expected) 1. Go to Console. Go to Case 2. open Any one case 3. go to RelatedList And Click on NEW APPOINTMENT. here the New Appt page doesn't open. Scroll bar disappears on "Find-A-Time" on smaller monitors.
Invite Limits	Guest users can schedule past the invite limits (# of Appointments per Invite, Case, or System) if and when the Expiration date is in the future (aka still open invite). Limit # of Open Appointments Per X Include Limit across all Self-Scheduling Include limit across manually booked appointments
Self-Scheduling (Who)	When you "Show All" some custom filters may not return expected results. (i.e. multiple values in Multi-Select Fields, Multi-Select & Picklists, etc).
Self-Scheduling Auto-Time Zone association	Mac & PC - is having issues auto-associating Atlantic Time Zone for US guests. Mac only - West Greenland, Greenwich Mean time, West Africa (Nigeria), Uzbekistan (Uz) and Australian Western (Port Hedland) PC only - Baja California, Caracas, Cuiaba, Santiago, Turks & Caicos, Brasilia, Kiritimati Island.
Ongoing Sync	Assigned To & Description, does not carry changes through to the other side (Event/Appointment) after changes are coming in from 3rd party tools on recurring appointments.
Email Notifications	Email notifications from Master Calendar do not send to Lead (most) Email notifications from Master Calendar do not send to Contact (Drag n Drop across Days)
Lightning Only	• when 'hide sumo bin' =true, user can still see/use filters in lex (based on their access it may not render information for them) • Workshift calendar doesn't display error and didn't save a drag and drop to new provider.



LIMITATIONS

We're aware of the following limitations that we need to tell the customers before Implementation.

FUNCTIONALITY	DETAIL
Console	When in Lightning or Classic: Chatter Edit link feed on Email or Case/Appointment record opens outside the console if clicked from the console
Console	Symptom: In Console, when you click on new appt, you can fill it out but it goes blank when it should redirect you to succ. created appt. Places: 1. New Appointment Buttons on Lead, Contact, Case 2. visual buttons in our VF Related lists on those objects. 3. New Appointment SF1 / Global Actions on same objects NOTE: If you are in classic and go into console this sometimes works - be sure to 'flip' to classic and then 'flip into lex' THEN test in Console to ensure no further causes to this issue
Console	RELATED TO LINK 1. Go to an existing Appointment that is related to a case. Open this appointment in a primary tab 2. Go to a Case and open a different related Appointment from there 3. Click on the Case linked in "Related To" field. This will open outside of Console, gives you an option to go back when you are done.
Non US Locale	• This has currently been fixed on the appointment edit page only. • The appointments are being created as per the logged in user's locale settings, however, on the calendar they are being displayed as per US date formats. This is a potential known issue which we aim to fix in our latest upcoming version as this will require a completely new version of the SUMO package with additional metadata required to control these settings. Unfortunately, the Salesforce platform does not allow us to introduce new metadata in a patch release.





PATCHES / FIXES

The following patches and updates have been made to this release.

PATCH #	RELEASE DATE	UPDATES
5.7.0-5.7.4	2/5/2018	Security enhancements & previous patches are included in the first immediate patches to each release.
5.7.5-11		• Security Enhancements applied • Person Account Id not passing correctly (error in Self-Scheduling (Last Step)). • Self-Scheduling Where Step - Map does not load initially on the where step (City) • Self-Scheduling Where Step - Map does not load initially on the where step (Country) • Calendar in mobile skipping Sunday when in 'Day' view • Custom Person Account Query Enhancements ◦ Admin Setting > Login Register (Account Name)+ Sites Fixes (SOQL Account) ◦ Admin Setting > Login Register (Managed Package custom field)+ Sites Fixes (SOQL Account) ◦ Admin Setting > Last Step (Managed Package custom field)+ Sites Fixes (SOQL Account)
5.7.12	11/02/2018	#77: Salesforce for Outlook errors when inserting New Recurring Event to SF #32: Self Scheduling: No Decline Button on Appointment Options Page. #250: Self Scheduling: Guest User Confirmation Page does not show Text Reminder Field & Phone number field is displayed incorrectly on the UI. #290: Calendar Sync: Every Weekday event creation did not have the link to the Correct corresponding Salesforce Event. #289: Calendar Sync: When Creating Everyday Appointments, the first SFDC Event does not have the corresponding appointment link at all and all other child events contain the link to the master SUMO Appointment. #239: Calendar Sync: When creating or Editing a Salesforce Event, the value in the RelatedTo field was getting dropped from the SUMO Appointment. Also, when creating or editing a SUMO Appointment, the value from the RelatedTo field on the SFDC Event was getting dropped. #150: Calendar Sync: Field values not syncing from Salesforce to SUMO when creating or editing Recurring Events. #293: Recurring Appointments: Unable to create Recurring Monthly & Recurring Yearly Appointments. #241: UK Locale not being supported. Save functionality not working on Creating / Editing Workshifts. #297: Recurring Appointments: Calculate Max End date is not working for any of Daily, weekly, monthly or Yearly Sumo Recurring Series. #249: Appointment Edit Page: Lightning Search Results on the Appointment Edit page were inconsistent. When creating a lookup to an object and trying to add a secondary field to the lookup in Lightning (Salesforce Functionality), the secondary field value was not getting displayed on the EventEditLDS page.



		#35: Lead Form: Custom field values were not getting populated on the Lead Form. #58: Calendar Sync: If the value of the Description & Web Conference fields was set to null on the SUMO Appointment record, sync from SUMO to Salesforce would not get initiated #163: Calendar Sync: When editing a recurring series of SUMO Appointments and changing the dates specifically, the change was not reflecting on the corresponding Salesforce Events. #34: Appointment Options Page: Add to Outlook and Add to Gmail Buttons on the Appointment Options Page not adding appointments to Outlook / Gmail consistently. #122: Appointments Page: When attempting to open the Appointments Detail page in Classic view, the user was getting redirected to the same page in Lightning View. #179: Self Scheduling: Whenever the account was pre-selected and the account id was being passed in the URL for any page on the Self Scheduling Site, IsPersonAccount check box was getting checked automatically. #29: Calendar Sync: Unable to create Recurring Salesforce Events when the Calendar Sync Functionality was set to "ON". #191: Recurring Appointments: Unable to edit the Start or End Date of a Recurring Appointment. #23: Self Scheduling: In Self Scheduling Settings, the default value of the company name is was being preset for contact scheduling and the default value field was being hidden from the contact form. This default value was not getting committed to the database. #36: Calendar Sync: When cancelling SUMO Appointments, the corresponding Salesforce events were not getting deleted. #19: Person Accounts: Guest Experience results in AccountId errors when handling Person Account. #5: Google API: Invalid Google API key errors in console when trying to load the map on where step and when clicking the GET GEOCODE button on Location Page. #33: Calendar Sync: Appointments / Events marked as Private not syncing from Salesforce to SUMO and vice versa. #78: Where Step Issue: With "Allow/Block" browser setting set to "OFF", on the where page Google Map tries to load, fails and an empty map was rendered. #8: Self Scheduling: Authorization Required error after submitting the Login/Register/Guest Page in Self Scheduling. #228: Recurring Appointments: In case of recurring series, when the Start Date/time & End Date/Time was being changed and the option to cascade the changes to all the Appointments in the series was being selected, all child appointments were getting Cancelled automatically. #225: Web Conference Details: When an appointment was being created from the Appointment detail page, the description and the web conference field values were not getting cascaded to the Appointment Options Page. #20: Lightning: The RelatedTo field was not showing the correct list of objects in Lightning View specifically.
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5.7.13	11/18/2018	#354: Calendar Page: Participants being displayed on Appointments on the Sumo Calendar were inconsistent. Only the AssignedTo Provider was being displayed. This issue was fixed to ensure that Contacts Or Leads would show up before the provider on the appointment being displayed on the Calendar page. #351: Lightning Version: Custom Lookup Input Search field was not displaying the values of the secondary fields in lightning only.
5.7.14	11/29/2018	#273: Sites: When updating a contact from Site, the IsPersonAccount checkbox was getting checked automatically. #441: Sites: On the Last Step Page, if the required field wasn't populated, the Schedule Now button stopped working.
5.7.15	01/02/2019	#465: WorkShifts: On the Location detail page, when a new workshift is being created by clicking on the "NEW" button in the WorkShift related list section, the Workshift Detail Page is rendered. On this page, the Location field was not getting auto populated with the location name from where the transaction originated. Issue Fixed. #466: WorkShifts: On the Contact detail page, when a new workshift is being created by clicking on the "NEW" button in the WorkShift related list section, the Workshift Detail Page is rendered. On this page, the Provider field was not getting auto populated with the Provider name from where the transaction originated. Issue Fixed. #467: Appointments: Upon editing an appointment, the participant status was defaulting to "Confirmed" status, but the in the participant info field on the appointment page as well as in the appointment booked email, the participant status was showing "Awaiting". Issue Fixed. #501: Sumo Calendar: In Bin mode of the Sumo Calendar, any appointment which has a Non Provider participant, would not get dragged and dropped to another provider's lane. Issue Fixed. #485: Location Page: On the Location detail page, upon clicking the "Get Geocode" button an error was being displayed. Issue fixed.
5.7.16	01/30/2019	#783: Lightning Experience: Custom lookups exposed to the Account Object from different objects were not visible in the Related To field on the appointment detail page. Fixed.
5.7.17	02/06/2019	#611: Recurring Appointments: When creating recurring appointments with frequency set to "WEEK", the field "Recurr Every X Week(s)" set to "2", Days of the week selected to be "Monday" & "Friday", appointments were being created on incorrect days. This issue was fixed. #667: Appointments: The participants being displayed on the Appointments on the calendar page were not being displayed in the correct order. The issue has been fixed. #796: Calendar Page: The Slot Logic for displaying slots on the Calendar was refactored to break slots on the basis of 15 minute intervals as compared to the primitive logic of breaking slots on the basis of the duration of service. This was done in order to Optimize the Utilization of Providers. #627: Assignment Engine: There were some performance optimization related fixes that were made to the Load Balancing Algorithm to ensure that the correct Provider was Selected after subjecting a pool of providers to Load Balancing. #638: Calendar Sync: When creating Sync through Sumo Admin settings on the basis of Profiles instead of Users, Salesforce Events were not getting synced over to the Sumo Calendar as Sumo Appointments. The issue was fixed to support profile based sync.



		#640: Providers: Contacts with "Is Provider" checkbox checked but having record type as "Contact" were not visible when searching for providers on the Provider Name search field when creating or editing work shifts. Issue fixed. #780: Recurring Appointments: Unable to add participants to recurring appointments for the "Following" series and "All Appointments" use cases. The error displayed was incorrect. Error was fixed. #642: Appointments: When creating any Sumo Appointment, the participants status was automatically being set to "Confirmed" instead of "Awaiting" for all participants minus the assigned to provider. Issue fixed. #806: Appointments: When editing an appointment and changing the participant status to "Confirmed / Declined" by double clicking on the participant, the updated status was not getting reflected on the appointment on clicking Save. It was being reset to "Awaiting". Issue Fixed. #639: Self Scheduling: The footer section was not visible on every page of the site. Fixed.
5.7.18	02/17/2019	#801: Shield Encryption: As per the current logic, the contact name field when being Encrypted using shield encryption, was showing errors on page load. This was because this field as used in the where clause of certain SOQL Queries. Queried Updated.
5.7.19	02/28/2019	#846: SUMO Calendar: Providers on Sumo Calendar were not Sorted alphabetically. Issue Fixed. #888: Ongoing Sync: All Day recurring Appointment were not syncing properly. Issue Fixed. #869: Workshift: Unable to create Work shift through Provider record type (CLX/LEX). Issue Fixed. #865: Appointment page: Unable to use Related to field when only Read access is given to Case Object. Access matrix updated. Issue fixed.
5.7.20	03/06/2019	#895: SUMO Calendar: Drag and Drop was not working for Appointment On Sumo Calendar. Issue Fixed.
5.7.21	04/09/2019	#1067: Data Import: When importing 200k Person Accounts, Non-Selective Query against large object type error occurs. Issue Fixed by optimizing the queries. #1004: Initial Sync: Events were not syncing which are within Sync range. Issue Fixed. #1069: Contact Search: Contacts search was not working for some of the fields like first Name, last name, email etc. Issue Fixed. #1030: Recurring Appointments: Unable to create Recurring All day Appointments. Issue Fixed. #1056: Ongoing Sync: Cancelled Appointments were also syncing from SUMO to SF. Issue Fixed. #868: Undo Sync: Undo sync was also deleting the original appointments. Issue Fixed. #990: Find a Time: Find a Time UI Redesign Reset button is added on Find a Time to reset to its default stage. #1220: Appointment page: Create New Appointment page consumes participant ID in URL add these passed id as participants on Appointment page. Create New Appointment page consumes Service ID in URL and add the passed Service id as Service on Appointment.

