



Release Notes

SUMO 5.5

Release Date: Oct 06, 2017

Author: Jason North

FEATURE UPDATES

SUMO 5.5 includes 10 primary new features and enhancements:

1. New Appointment Wizard
2. Salesforce Console in Lightning
3. Pass More Data in Self-Scheduling
4. New Contact Matching Criteria
5. Salesforce Person Account Support
6. Where Page 2.0
7. Support Longer Location & Provider Names
8. Captcha Now Supported
9. Shield Encryption
10. Security Updates

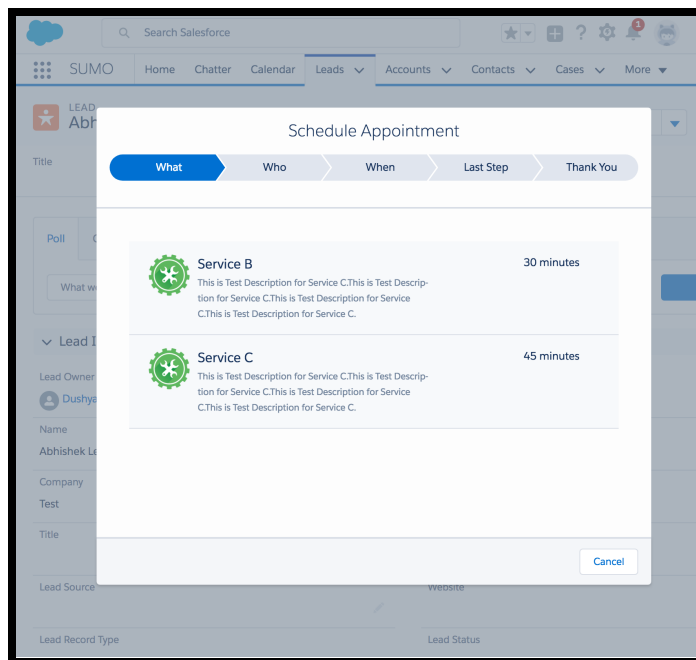




NEW APPOINTMENT WIZARD

SUMO 5.5 now includes a powerful new feature for employees to easily schedule appointments using the New Appointment Wizard. This functionality is available on the lead, contact, and case object in Salesforce. By clicking the “New Appointment Wizard” a Salesforce user may now navigate through a simple wizard (similar to the customer self-scheduling process).

The New Appointment Wizard integrates with the SUMO Assignment Engine, enabling you to use our automated routing features, such as Round-Robin, Load-Balancing and more.



For example, a new lead comes into Salesforce and they are interested in a Product Demo, a Pricing Discussion, or a Partnership Discussion. Different teams handle these, so you may choose the “WHAT” the prospect wants, then you may choose the “WHO” (a team or individual to schedule with), and then will be offered available times.

This same scenario could play out on a Salesforce Case or contact as well.

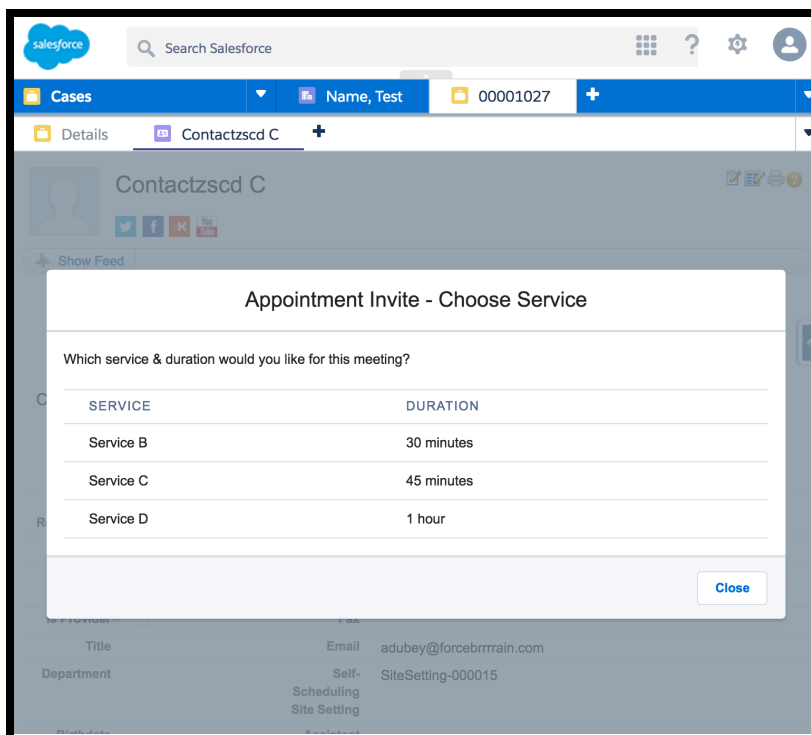
NOTE: The New Appointment Wizard only runs in Salesforce Lightning experience.



SALESFORCE CONSOLE IN LIGHTNING

In SUMO5, we supported SUMO running in the Salesforce Console for Classic Mode. Now in SUMO 5.5 we support SUMO running the Salesforce Console in Lightning Experience.

NOTE: To clarify, SUMO does not yet run in the new Lightning Console that is in BETA. However, we have this planned on our roadmap for future support.





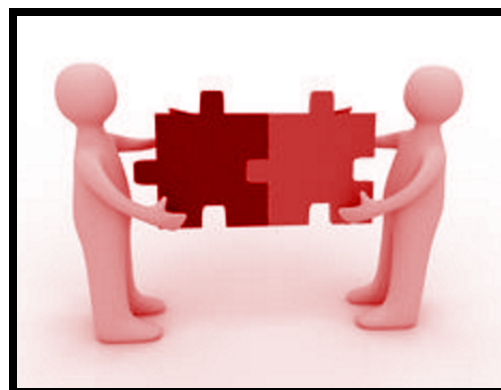
PASS MORE DATA IN SELF-SCHEDULING

You may now pass multiple sets of data into a self-scheduling URL. For example, you may wish to put a “Schedule Consultation” button on a product page on your web site, and if the customer clicks this, then pass the Product Name, Product Price, and Product Description into the self-scheduling URL. This information will be automatically merged into the Appointment.



NEW CONTACT MATCHING CRITERIA

When self-scheduling an appointment using SUMO, we’ve now added a few new features to broaden how we match on contacts and create new contacts. You may choose to only match on contacts that were created by a SUMO self-scheduling process and allow updating any changes to contact information entered, such as an updated mobile phone number, necessary to receive a text message reminder.





SALESFORCE PERSON ACCOUNT SUPPORT

If you have “Salesforce Person Account” enabled, you can now allow people to self-schedule using person accounts in Guest Mode. This is a feature you must enable in your Salesforce Org, which means you are not forced to create an Account, in order to create a contact and is particularly useful for Retail or Healthcare customers.

NOTE: SUMO also has it's own concept of a Person Account, which you can learn more about [here](#). Both models are supported.

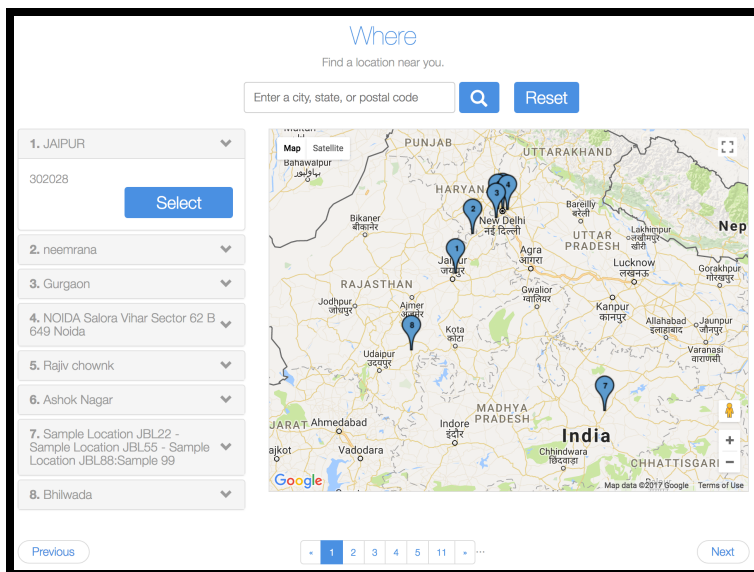




WHERE PAGE 2.0

We've made a number of improvements to the WHERE page in our self-scheduling process, including:

- Improved Geo-Location Detection
- Improved proximity search at city, state, and postal code level.
- Ability to set Default Mile Radius.

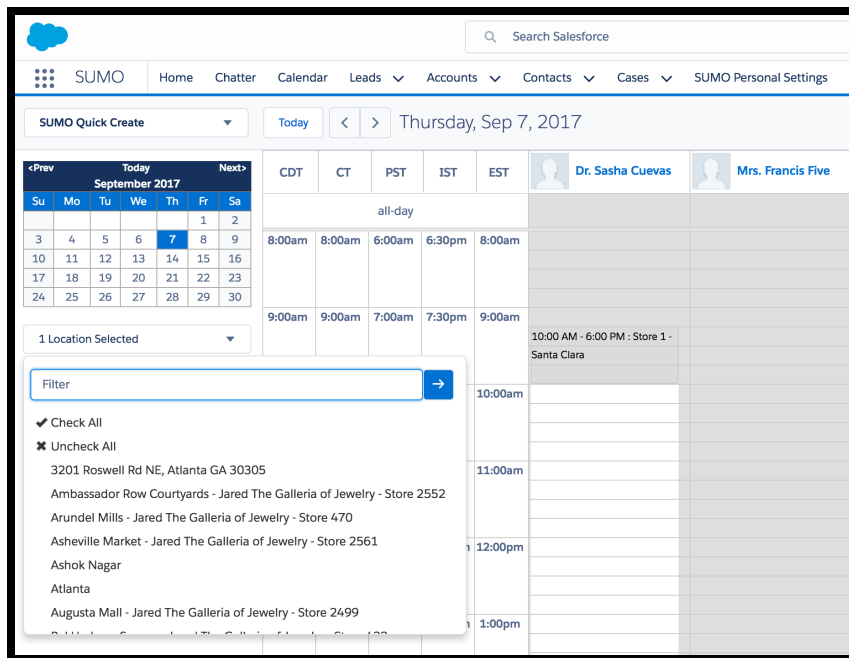




SUPPORT LONGER LOCATION & PROVIDER NAMES

In previous version, the SUMO Calendar would truncate Location and Provider names greater than ~30 characters.

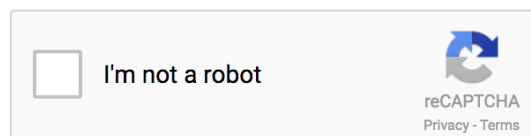
We've increased this limit and improved the user interface to support longer Location and Provider names.





CAPTCHA NOW SUPPORTED

In order to protect against SPAM BOTS potentially self-scheduling countless fake appointments, SUMO now supports CAPTCHA technology.

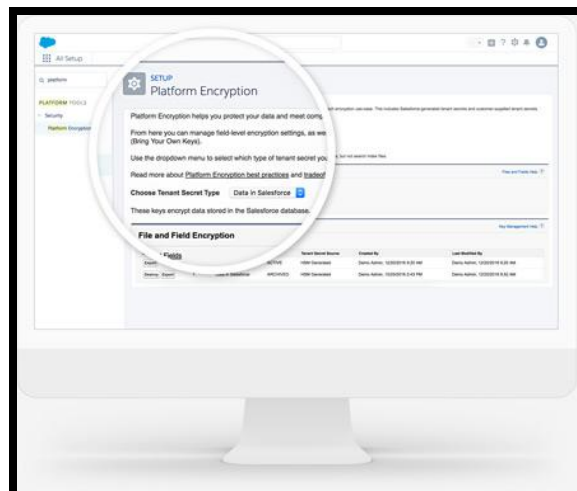


You may now enable or disable CAPTCHA on a number of steps in the self-scheduling process as you see fit.

SUPPORT SHIELD ENCRYPTION

SUMO now supports [Salesforce Shield Encryption](#).

- Protect your enterprise with point-and-click tools that enhance trust, transparency, compliance, and governance across all of your business-critical apps.
- As more customers use Salesforce to store PII, sensitive, confidential, or proprietary data, they need to ensure the privacy and confidentiality of that data to meet both external and internal data compliance policies.
- Platform Encryption is designed to allow you to retain critical app functionality — like search, workflow, and validation rules — so you maintain full control over encryption keys and can set encrypted data permissions to protect sensitive data from unauthorized users.
- Platform Encryption allows you to natively encrypt your most sensitive data at rest across all your Salesforce apps.





SECURITY & AUDIT UPDATES

With every release of SUMO Scheduler, we run our software application through rigorous code scanners and security reviews to identify and address any potential security vulnerabilities.

SUMO 5.5 includes countless security updates and is our most secure version of SUMO to date.

SUMO 5.5 also includes a secure audit solution whereby SUMO will provide us real-time updates of our customers usage of SUMO limited to # of users and # of self-scheduled appointments each month.





PATCHES / FIXES

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

PATCH #	RELEASE DATE	UPDATES
5.5.27	06/24/2018	# 684847680 - Non-Selective Query error in large data orgs (when saving appt)
5.5.28	10/04/2018	# 127 - Oops Error on Reminder Details Page
5.5.29	11/18/2018	# 367 - Self-Scheduling: Person Accounts being created under incorrect record type
5.5.30	01/03/2019	RELEASE DEPRECATED
5.5.31	01/14/2019	RELEASE DEPRECATED
5.5.32	01/16/2019	# 617 - The field "Hide Appointment Slot when Customer is already booked" on Sumo Admin Settings was not working correctly. The customer was being allowed to get double booked. This issue was fixed.
		# 555 - Load Balance Optimization: There were some performance optimization related fixes made to the Load Balancing Algorithm.
		# 512 - Slot Logic: 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.

KNOWN ISSUES

We're aware of the following known issues and are working on a solution to be released in a future patch.

ISSUE	DETAIL
CONSOLE (CLASSIC)	• Related To field on Appointment Detail page doesn't open in new Sub-Tab, instead it opens in the same Sub-Tab. • Participant Name field on the Appointment Participant related list under Appointment detail page doesn't open in new Sub-Tab, instead it opens in the same Sub-Tab. • Chatter Edit link feed on Case/Appointment record opens outside the console if we clicked this from console.
CONSOLE (Lightning)	• Related To field on Appointment Detail page doesn't open in new Sub-Tab, instead it shows blank external page. • Participant Name field on the Appointment Participant related list under Appointment detail page doesn't open in new Sub-Tab, instead it shows blank external page. • Chatter Edit link feed on Case/Appointment record opens outside the



	console if we clicked this from console. From Lightning console when you directly move to SUMO App the Home page will have no header. Please use Setup Icon/ any other APP for a workaround.
Sunday Day View (Mobile)	We are skipping Sunday from the When step when customer is in the day view in a mobile

LIMITATIONS

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

FUNCTIONALITY	DETAIL
PASSING MORE DATA IN SELF-SCHEDULING	- WE DON'T SUPPORT THESE SPECIAL CHARACTERS IN THE URL. [%,&,#]. - WE ONLY SUPPORT THE FOLLOWING FIELD TYPES. [CHECKBOX,CURRENCY,NUMBER,TEXT,URL & PICKLIST]

