

Capability Matrix: SUMO CEP vs. SUMO APPTS

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Both of the following SUMO products are built native on Salesforce. However, they do have a number of distinct differences, which are important to understand.

SUMO CEP	SUMO APPTS
SUMO CEP is our “Customer Engagement Platform” that includes both an Appointment Scheduler, Event Scheduler, and more.	SUMO Appts is our flagship product that focuses exclusively on Appointment Scheduling.
In addition to differences in the feature set, a core distinction is this tool relies on a real-time Calendar Connector, if you choose to connect SUMO to a 3rd Party Calendar, such as Outlook or Google Calendar.	In addition to differences in the feature set, a core distinction is this tool relies on Calendar Sync technology, if you choose to connect SUMO to a 3rd Party Calendar, such as Outlook or Google Calendar.

Calendar Connectivity

Calendar availability and appointment management.

FEATURE	SUMO CEP	SUMO APPTS
Salesforce Calendar May operate with only the Salesforce Calendar without sync or connector to 3rd party calendar.	✓	✓
Compatible with Calendar Sync Customers may use Lightning Calendar Sync to sync SUMO Appointments to 3rd Party Calendars.	✓ <i>*Optional</i>	✓ <i>*Optional</i>
Real-Time Availability on Connected Calendar Ability to check SUMO users availability on their connected calendar in real-time.	✓	✗ <i>*Relies on Sync</i>
Microsoft Office365 Real-Time Connector	✓	✗
Microsoft Exchange Real-Time Connector	✓	✗
Google Calendar Real-Time Connector	✓	✗

Appointment Scheduler

A Powerful Appointment Scheduler - Let Customers Quickly Self-Schedule Appointments

FEATURE	SUMO CEP	SUMO APPTS
Appointment Link Builder (Personal Links) Each SUMO User has a personal appointment scheduler link, primarily used in their email signature.	✓	✓
Appointment Link Builder (Group Scheduling Links) An unlimited # of appointment scheduler links may be created for individual users, groups of users, and resource pools.	✓	✗
Online Appointment Scheduler Ability to deploy an online appointment scheduler widget on a website, community, etc.	✓	✓
Instant Appointment Booker (Schedule Now) Instantly find a resource, available time slot, and book it.	✓	✓
Available on Any Standard or Custom Object	✓	✗ <i>*Only available on the Lead object.</i>
Schedule on Behalf Of	✓	✓
Group Scheduling	✓	✗
Resource Pools	✓	✗
Buffer Time	✓	✗
Time Options (Date Range, Rolling Window, Custom)	✓	✗
Invite Manager (Email Invite) Send secure personalized appointment invites.	✓	✓
Available on Any Standard or Custom Object	✓	✗ <i>*Only available on the Lead object.</i>
Schedule on Behalf Of	✓	✓
Group Scheduling	✓	✗
Resource Pools	✓	✗
Buffer Time	✓	✗

Time Options (Date Range, Rolling Window, Custom)	✓	✗
Assignment Engine Auto-assign users based on various assignment modes.	✓	✓
Round-Robin Assignment Mode	✓	✓
Priority-Based Assignment Mode	✓	✓
Service/Skill Based Assignment Mode	✓	✓
Load-Balance Assignment Mode	✓	✓
Reminder Engine	✓	✓
Email Reminders (Template-Based)	✓	✓
SMS Text Reminders (Template Based)	✓	✓

Event Scheduler

A Powerful Event Registration System - Let Customers Quickly Register for Events & Classes

FEATURE	SUMO CEP	SUMO APPTS
Online Event Registration Sites Launch online event registration sites for single events, recurring events, courses, and more.	✓	✗
Event Link Builder Quickly create all types of events based on templates.	✓	✗
Event Templates Admin control of messaging, branding, and various configurations, necessary to delegate location-level event coordination.	✓	✗



Core Platform Functionality

Additional features available for all CEP modules (Appointments, Events, and more).

FEATURE	SUMO CEP	SUMO APPTS
Multi-Calendar Calendar for hosts, locations, and resources.	✓	✓
Color Coding	✓	✓
Save Calendar Views	✓ <i>*Saved Filters</i>	✓ <i>*Saved Bins</i>
Custom Filters	✓	✗
Auto-Availability	✓	✗
Advanced Find	✓	✗
Drag & Drop	✓	✓
Analytics	✓	✓