



Release Notes

SUMO 4.8

Release Date: 03-03-17
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FEATURE UPDATES

SUMO 4.8 includes 10 primary new features and enhancements:

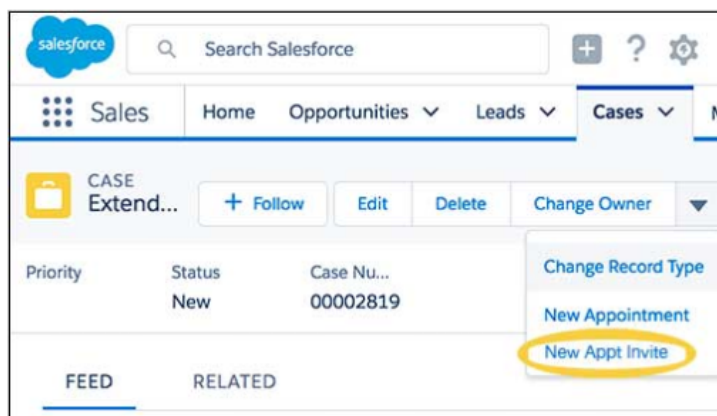
1. Outbound "Send Appointment Invite" 2.0
2. Appointment Invite w/ Encryption
3. Customer Experience: Link Expirations & Limits
4. Employee Experience: Invite Limit Alerts
5. Employee Experience: Resend Invite
6. Master Site & Personal Sites
7. Auto-Chatter Employee
8. Deploy Across Multiple Salesforce Orgs
9. Assigned To on Appointment
10. Agent Console Experience



OUTBOUND - SEND APPOINTMENT INVITE

In SUMO 4.8, we've introduced a number of improvements to our outbound functionality, which runs in the Salesforce Sales Cloud® and Service Cloud®. First, a review of Outbound vs Inbound:

Outbound is when your team sends an Appointment Invite email to your customers (or prospects), requesting them to click a



“Schedule Now” button in the email to choose a time and self-schedule an appointment with them specifically or your team. In other words, “Outbound” is your team initiating the request to meet.

Inbound is when you put a “Schedule Appointment” link or button on a public web property, like your web site, a community, your social media page, etc... and your customer (or prospect) initiates the request for a meeting.

APPOINTMENT INVITE w/ ENCRYPTION

When sending an appointment invite hyperlink to prospects or customers, you may wish to encrypt the URL, so it can not be hacked.

SUMO 4.8 includes the ability to encrypt the self-scheduling process with AES 256 Cryptography algorithm. 256-bit encryption refers to the length of the encryption key used to encrypt a data stream or file. A hacker or cracker will require 2^{256} different combinations to break a 256-bit encrypted message, which is virtually impossible to be broken by even the fastest computers.





LINK EXPIRATIONS & LINK LIMITS

When your team uses Outbound to initiate an appointment request by sending an email invite, you may wish for this invite to expire after a certain period of time. SUMO 4.8 includes the ability to configure this.

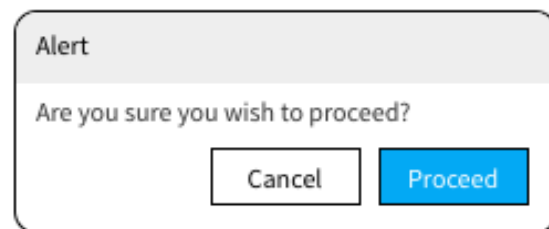
In addition, you may wish for an appointment invite to be only used a limited # of times to schedule an appointment.



INVITE LIMITS & ALERTS

You may also wish to limit your employees from sending too many appointment invites, or alert them if invites have already been sent, etc...

SUMO 4.8 includes a number of updates to the employees experience in both the Sales Cloud® and the Service Cloud®.



INSERT CODE IN HEADER & BODY (EX: GOOGLE ANALYTICS)

You are now able to insert a snippet of code into the Header or Body of the SUMO Self-Scheduling Site pages, such as Google Analytics.



MASTER SITE & PERSONAL SITES

SUMO 4.8 now offers the ability for an Administrator to define a “Master Self-Scheduling Site” to be used by employees for their “Personal Self-Scheduling Site”. For large deployments, this saves the admin the time of having to create 500 self-scheduling sites (1 for each employee), and instead create 1 master site.



DEPLOY ACROSS MULTIPLE SALESFORCE ORGS

More support for large enterprise organizations, including the ability to securely deploy SUMO Scheduler across multiple Salesforce Orgs. These feature can enable you to manage self-scheduling from a Salesforce Site or Salesforce Community from 1 Salesforce Org, while managing employees, work shifts, and more from another Salesforce Org.



APPOINTMENT “ASSIGNED TO”

In SUMO 4.8, we also introduced the concept of an “Assigned To” owner on the SUMO Appointment, to better support integration with Salesforce, Outlook, and Google Calendar.

Calendar Details

* Assigned To

 Jason North ×

* Subject

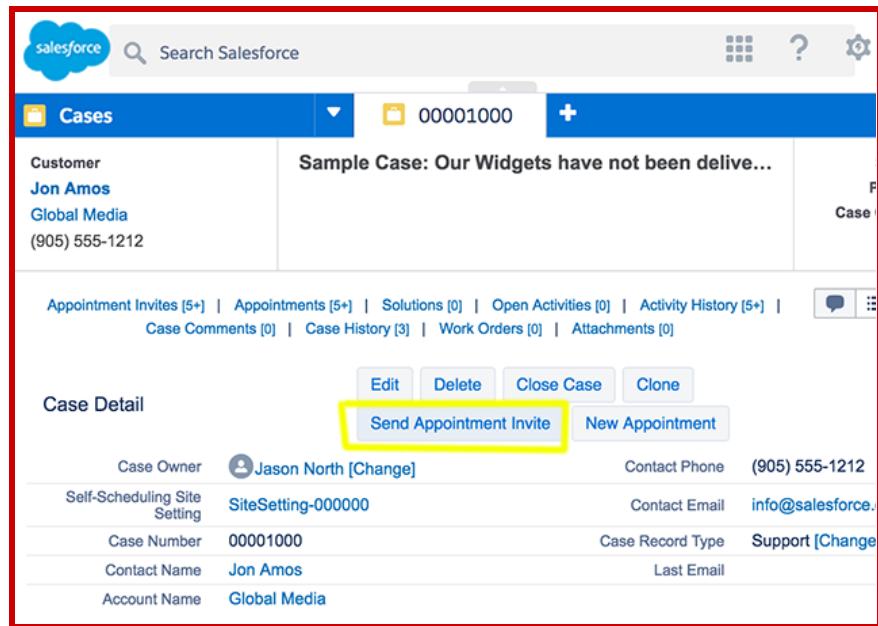


SALESFORCE CONSOLE AGENT EXPERIENCE

Customer Support Agents will also be able to use SUMO Scheduler in the Salesforce Console.

From a Case, an Agent can “Send an Appointment Invite” to a customer, which enables them to self-schedule an appointment.

Agents may also access SUMO appointments and related functionality from the Salesforce console.



This release excludes the “manager” and “admin” experience in console, such as the Master Calendar, Workshift Calendar, Personal Settings, Admin Settings, etc.



PATCHES / FIXES

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

PATCH #	RELEASE DATE	UPDATES
4.8.8	03-16-17	458271511 -- Self-Scheduling Settings updated to consider single selected service as hard coding the service. 464135417 -- Post Install Script updated to handle updating Crypto-Key upon install. 417075784 -- Appointment Options and Appointment Details pages updated to better handle quotes in Appointment Description field. 455805512 -- Cal Sync functionality updated to better handle syncing of multiple events via Salesforce for Outlook within a single Sync. 459834852 -- Removal of CSS for Self-Scheduling from the package. 452381323 -- New Feature to better handle the New/Edit appointment page when the Other service is used after typing in a custom value.
4.8.12	04-04-17	457025899 -- Post Install Script update to name the Account the same as the Contact. 461786848 -- Clicking into the WS Calendar will work in either both Dev and UAT orgs by adding if to determine if namespace prefix is needed 465462581 -- Allow chatter to be posted to either CASE or appointment. 455805512 -- Creating two recurring series and syncing in single SFO Sync results in only one of them making it to SUMO 463538650 -- Cal Sync updated to ensure Invitee is created under the SFDC Event 451390943 -- Update to ensure starting over doesn't ask the Self-Scheduler who they are a second time. 414094254 -- Better email validation on the Login/Register/Guest Mode page. 450733856 -- Set class to be without sharing to resolve EventRelation not supported error. 450805871 -- Drag & Dropping of a recurring series occurrence mid series resulted in the location being nulled out. 452141502 -- Google Maps API Key issue 450177412 -- Self-Scheduling settings not properly updating the ICS Custom Values when changed. 447347024 -- Ensure Web Conference details are displayed on the confirmation page. 449604370 -- Last Step custom fields added to the page not showing up due to object being renamed. 451753856 -- Set Limits to the custom values allowed for the ICS Organizer fields. 447575637 -- Set a default value for Round Robin upon upgrade. 417075808 -- Update the Appointment Text color upon Self-Scheduling so that it's appropriate rather than white. 448045164 -- Create validation rule to not allow setting appointment color to white. 465365711 -- Event Edit URL from Chatter post updated. 465366191 -- Additional validation on the Send Appointment Invite button on the case object.



		• 469807897 -- Minor cosmetic updates to the Chatter notification related to Cases on either Appointment or Case. • 469807905 -- Minor cosmetic update to the Appt Invitation VF Related list. • 464143749 -- Send Appointment Invite Button validation when the case owner is a queue. • 453815611 -- Minor cosmetic update to the Appt Invite object visible from VF related list. • 469958044 -- Added Expire as option in the Appt Invitation VF related list. • 444716389 -- Self-Scheduling Login/Register page updated to better handle custom validation rules. • 467801817 -- Minor cosmetic update to the Self-Scheduling Last Step Settings page. • 465366191 -- Case Send Appt Invite Button Validation to present error when owner is inactive. • 469024969 -- Case Appt Invite Self-Scheduling Process setup to ensure appointment is booked with case owner in the event of case reassignment after invitation is sent. • 467796491 -- Self-Scheduling confirmation page updated to show Add to Outlook / Google Calendar options when in Response mobile/tablet modes. • 470935184 -- Minor cosmetic updates to the "Warning" popups. • 470935183 -- Minor cosmetic updates to the popup buttons for Send Appointment Invite Button on Case. • 470935182 -- Minor cosmetic update to the popup for Send Appointment Invite Button on Case when selecting a Self-Scheduling Process. • 470931888 -- Minor cosmetic update to the Send Appointment Invite Button on Case. • 470974316 -- Removed the Resend Expire options from Appointment Invite VF Related List on Case when Appointment has been Booked. • 470944693 -- Minor cosmetic update to the Self-Scheduling settings to use Case Record-Type label rather than API name. • 470935198 -- Minor cosmetic update to the Alert regarding deleting link between services and record-types. • 468507852 -- Self-Scheduling Settings page update to handle properly saving updates to Rich Text Field on Thank You step. • 470352195 -- Add to Outlook button code update to handle conditionally adding namespace prefix depending on environment. • 469128931 -- Appointment Invite will book Appointment with new case owner if case has been re-assigned. • 469947313 -- Self-Scheduling process updated to better handle changes to the Case Owner such as being de-activated or having their SUMO license removed.
4.8.14	04-17-17	• 470634424 -- New/Edit Appointment page updated so pressing enter doesn't result in the first provider being removed • 473619825 -- When using partid= page parameter with only a customer then ensure to *NOT* populate Assigned To Field. For Example the new appointment button on contacts, leads, and cases. • 465341520 -- Update to Contact Trigger to handle creation of Providers better. • 474997180 -- Case Send Appointment Invite Button updated to Remove query on UserPackageLicense object (removing Manage Package License permission requirement for user clicking the button). Added query to determine if the Case Owner has a Provider Contact Record with



		Currently Working set to True. 475210019 -- New/Edit Appointment Page updated to better handle pressing enter on certain fields (the Household, Assigned To, Start Date/Time, End Date/Time, and Related To fields). 472272397 -- When using Record Type Associations with Multiple Services we've updated the LeadRegistration page to better handle passing of the SID Page Parameter 470641933 -- New/Edit Appointment page updated to ensure provider gets added to Assigned To when clicking + from Day View in Find-A-Time. 474258758 -- New/Edit Appointment page updated to handle removing providers from participants list better for Assigned to (reassignment) 471682786 -- Updated error handling on Send Appt Invite button on Case when Case Owner doesn't offer Services that are related to the case. 458272967 -- SUMO Self-Scheduling Send Appointment Invite buttons Service/Record-Type Association Pop-up handling has been updated. 472117576 -- SUMO Admin Self-Scheduling Settings updated to remove radial buttons and simply use a multi-select picklist to select Locations. 464903615 -- Update to Contact Trigger to handle creation of Providers better in orgs with large data 462571039 -- Updated LocationDetails VF Page to utilize Google Maps API key when populated. 450593534 -- SUMO Setting update to validation field length restrictions. 462754167 -- SUMO Settings update to ensure width of users in Cal Sync will always show all users full name. 467835262 -- New/Edit Appointment Provider Advanced Search updated proximity search to handle entering in only zip code to return results. 470935206 -- SUMO Admin Self-Scheduling Settings updated to remove radial buttons and simply use a multi-select picklist to select Services.
4.8.20	05-05-17	460751075 -- Implemented Clone Option When Right Clicking on Appt from Master Calendar 462532232 -- Updates to the Self-Scheduling Calendar 481708087 -- Updates to Custom Field Admin/Personal Settings Field List 479296832 -- Adjusted the Header in Find-A-Time to prevent the header from becoming unreadable. 479211203 -- Updates to the Edit Appointment page to handle using Enter key to manipulate field values. 479384874 -- Fixed issue with Custom-Code fields in Self-Scheduling settings. 484718220 -- Added validation on Send Appt Invite Button on Case ensuring Case Contact and Email are populated. 484738279 -- Updated validation on Send Appt Invite button for determining existing limit is handled appropriately with manually created appointments. 485743568 -- Updated Send Appt Invite Button Resend functionality to properly update the Expiry Date 486061126 -- Added Try/Catch block around Send Appt Invite / Resend functionality in order to properly surface any custom validation rules. 484738266 -- Updated the Appointment Invitation Related List Buttons/Actions to work in Console as well as updates to the New/Edit Appt Page
4.8.55		527927275 -- trust: you cannot book appt for anything other than what's on the invite (with only exception being Case Owner is changed, should book w/ new owner and enforce it). Testing parameters, for All SUMO Parameters



		where info is stored on Invite, test to remove entire parameter, bad value and a legit value. 507910451 -- When changes (participants) come in to SUMO from Gmail (Cirrus)Providers are being added more than once. When any consecutive update happens (edit description) in Gmail, SUMO adds duplicate provider. 527927467 -- SUMO is updating Expiry Date too many times for our custom counters.SUMO to fix how they update so our counters work as expected. 529193963 & 529154424 --multiple occurrence public event record sync from SF calendar to SUMO - Description Missing on few childs. SUMO is not syncing event children in recurring when Description does not have "Description: " in the text.Sumo-->SFDC: Description tag is coming in Description field for recurring series SF Event ==> Sumo, Description is not getting updated in Recurring series - When we drag and drop Modified emails are not going to provider from Master Calendar (Day/Week view)
4.8.88	11/30/17	581899287: Calendar appt did not sync 473028271: Rec-Type/ Service Links - No Rec-Types left to link -> Disable Btn 531171478: Drag N Drop Recurring is overwriting Email Reminder 581813406: Calendar in mobile skipping Sunday when in 'Day' view 575905004: Drag N Drop Recurring is overwriting 1st Text Reminder, 2nd Text Reminder and Phone Reminder 466026314: Dep-If service text long then SS service page align messup
4.8.89	12/14/17	587135789: "Undefined 2017" header error on When Page while self scheduling Appt for the last week of December
4.8.90	12/22/17	584474527: Recurring Appointment not Showing 1st Appt in Series
4.8.94	3/29/2018	482008859:Update PIS to set reminder credit to \$50 rather than \$5 to match our website 362470629:Needs Documentation: The email saying you don't have enough credit doesn't indicate what org 632871614:Google Tag Manager Code Dropping Off Certain Pages 450623174:AppointmentOptions page 319492962:Lead Form -/- Company Name -/- Person Accounts -/- Allow NULL 472288668:Needs Testing: Add To Outlook / Add To GCal -- Hide Location When Service is Web Conf 415802307:When i reschedule an appt, reminder details page all reminders should be shows previous values



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
Service Cloud Console Compatibility	Currently some links visible in the UI when clicked from within the Console will cause errors / unpredictable / unwanted results. For Example if you are creating an Appointment in a sub-tab and click on the Providers Contact Record link from the Find-A-Time header the sub-tab will re-direct to the Contact detail page with no way to return back to the New/Edit Appointment page.