



Release Notes

SUMO 4.7

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Author: Jason North

FEATURE UPDATES

This release of SUMO includes 5 primary new features and a ton of minor enhancements.

- Round-Robin Assignment Mode
- Priority-Based with Load-Balance or Round Robin
- Assignment Mode Optimization for Large Teams
- Calendar Sync Optimization for Large Teams
- Improved Security Exploits

ROUND-ROBIN ASSIGNMENT

We've added a new assignment mode: Round Robin. Simply define a pool of resources for a self-scheduling process/site, such as a large sales team or support team and set the Assignment Mode to "Round Robin". Now when prospects or customers self-schedule an appointment, our Round Robin mode will assign the appointment to the next person on your team in a round robin fashion, to assure everyone gets an equal assignment of appointments.





PRIORITY WITH LOAD-BALANCE OR ROUND ROBIN

If you like our Priority-Based assignment mode, you'll love the two new options available to provide COMBO assignment modes.

As a refresher, Priority-Based scheduling allows you to define your "Priority 1" resources to be scheduled with first. Once these are all scheduled, then we scheduled "Priority 2" level resources.



Priority-Based with Load-Balance

- Now you can choose Priority-Based with Load Balance, in which case if there is more than one "Priority 1" resource available, the appointment will go to the resource with the most availability... to load-balance calendars amongst the "Priority 1" resources.

Priority-Based with Round-Robin

- Alternatively you can choose *Priority-Based with Round-Robin*, in which case if there is more than one "Priority 1" resource available, the appointment will go to the next resource in the "Priority 1" list to assure everyone gets an appointment.

ASSIGNMENT MODE OPTIMIZATION FOR LARGE TEAMS

In addition to adding new assignment modes and combo modes, we've completely re-designed our Assignment Engine to support a resource pool of 500+ resources. As a result, SUMO Scheduler can now manage appointment assignments across large sales and support teams to efficiently dispatch appointments fairly and evenly.





CALENDAR SYNC OPTIMIZATION FOR LARGE TEAMS

We've also optimized our consecutive calendar sync process (not initial sync) to better support large sales and support teams in excess of 500 people as well. This assures all calendars are in perfect sync with each other and no scheduling gaps or inaccuracies exist.



IMPROVED SECURITY EXPLOITS

We re-ran a number of industry standard code scanners to identify and resolve any and all vulnerabilities, including but not limited to:

- Stored XSS
- SOQL SOSL Injection and Sharing
- XSRF & URL Redirection Attack

PATCHES / FIXES

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

PATCH #	RELEASE DATE	UPDATES
4.7.1	12/15/16	• 410374670 -- View State Limit exceeded error resolved for Self-Scheduling Settings VF Page. • 322335345 -- Deletion of custom fields when previously added to Self-Scheduling form will no longer cause errors. • 409271795 -- Omitted providers with Currently Working field set to false from the Self-Scheduling Settings Who tab. • 409987856 -- Allow setting hidden and default values for fields on the Register/Guest Mode Self-Scheduling forms. • 407448370 -- Allow time zone to be merged into Text/Voice reminder templates. • 414796529 -- When hard coding an account for the Guest Mode option of Self-Scheduling subsequent loads of the page will show the ID that has been stored.



		• 413721444 -- Declining via Self-Scheduling site will result in the Appointment being cancelled and the SFDC event being deleted. • 412141778 -- Removed the Record Type clause from Self-Scheduling page controller(s). • 409980374 -- Adjusted the Login/Register pages to show Validation Rule error messages accurately. • 414094254 -- Optimized the Login/Register page to not take 20-30 seconds to return validation rule error when an incorrect email had been entered. • 416037756 -- Services are now sorted alphanumerically. • 414318109 -- Reminder records now appropriately relate to leads. • 416811022 -- LeadRegistration page now passes through the Pid page parameter. • 412636056 -- Deleting Events now results in the Appointment Participants records being set as cancelled • 417084914 -- Removed the Self-Scheduling Provider Search Criteria menu item from Custom Fields drop down. • 412254532 -- Dragging over an area on the Master Calendar to create an appointment will pull in the location based on where you started dragging. • 418423466 -- WF Rules/Field updates no longer cause duplicate appointments when creating events. • 420306725 -- Updated the New/Edit Appointment page to show the Show Time As field and ensured it sync's properly via Cal Sync. • 416506226 -- Validation Rule Error Message now show up on the LoginRegister page. • 413784842 -- Contact / Leads will have Sync'd Events show in the activities / activity history related lists on their respective page layouts.
4.7.3	1-3-17	• 426386821 -- Updated the source url for service images in self-scheduling. • 425919987 -- Updates to the work shift calendar code upon first load. • 429212382 -- Update trigger handler class to optimize a soql query. • 425213596 -- Sort locations in the picklist on the new/edit appointment page. • 427523577 -- Code update to prevent a List Index out of



		bounds error when swapping providers via Drag & Drop on Master Calendar. 426051708 -- Update to handle hard coding services, providers, and locations on the lead form in self-scheduling.
4.7.6	1-20-17	430734733 -- Update to the reschedule button in self-scheduling. 427523583 -- Extended the width of the Service field to match the width of the Location field on the new/edit appointment page. 427523577 -- Code update to prevent a List Index out of bounds error when swapping providers via Drag & Drop on Master Calendar. 427404821 -- Prevents a Too many SOQL Queries error when swapping providers via Drag & Drop on Master Calendar. 426485710 -- Update to Add to Outlook and Add to Google buttons. 436423554 -- Updated the back button on the last step. 425230381 -- Update to the Login/Register Self-Scheduling settings page to allow Account fields to be added to the Guest Mode form. 431080543 -- Add the Providers Web Conference link to the confirmation page if the service is web conference. 436480239 -- Updated query in SUMO Settings 435789961 -- Add the Providers Web Conference link to the accept/decline/reschedule page if the service is web conference. 436453170 -- Updated code ran while saving an appointment from the new/edit appointment page.
4.7.8	2-1-17	440145423 -- Updated the back arrow code in Self-Scheduling to include namespace prefix to prevent the process from erroring. 415884639 -- Updated code on the Guest Mode form to handle updates to the account/contact when the Contact ID is passed into the URL. 431765484 -- Updates to code handling appointment color in relation to the "Other" service.
4.7.11	2-15-17	442443029 -- Updated code to handle Apex Validation rules better on the new / edit appointment page. 442449603 -- Updated code to handle Apex Validation rules



		better on the new / edit appointment page. • 441701579 -- Skipping account update DML on the last step page in self-scheduling if not required. • 444705689 -- Update to fix UI issue of the new/edit appointment page. • 441012409 -- Added Admin/Personal setting for provider limit in default mode. • 441695493 -- Better handling of custom fields on the last step page of self-scheduling. • 442120707 -- Update to code on the self-scheduling confirmation / reschedule pages to show appointment times. • 444716389 -- Update to handle validation rules encountered while processing the guest mode form during self-scheduling
4.7.12	3-1-17	• 417075808 -- Handle color of self-scheduled appointments by service. • 449604370 -- Updated self-scheduling code to better handle adding custom fields to the last step page. • 447347024 -- Handle showing web conference details for self-scheduled appointments • 441701579 -- Skipping account update DML on the last step page in self-scheduling if not required. • 425230381 -- Update to the Login/Register Self-Scheduling settings page to allow Account fields to be added to the Guest Mode form. • 451753856 -- Set field length limitation on ICS custom values. • 414318109 -- Reminder records now appropriately relate to leads. • 415256415 -- Handle lead validation rules better on the self-scheduling lead form. • 448045164 -- Show error when saving an appointment with color set to white. • 447575637 -- Set default value for round robin in self-scheduling settings. • 414094254 -- Optimized the Login/Register page to not take 20-30 seconds to return validation rule error when an incorrect email had been entered.