Release Notes & Updates
October 16, 2020

These are the new features and updates for our second release for October.
If you have any questions about these or any features, please contact us at help@ce21.com

ACCOUNTS

- **Accounts > Customers > Customer Details > Purchases Tab: Downloading Certificate Open**
Certificate download issue: Chrome required an update to the system so that downloading a
certificate from Manager stopped requiring login
- **Issue: Multi choice, single answer, dropdown is appearing like radio buttons on front-
end.**
Edit Profile: Fixed an issue where a dropdown list was appearing as radio buttons

CATALOG

- **Move date formats from numbers to Month Name Day, Year**
Updated the date format on the catalog to abbreviated month, day, year
Group Landing Page missing the Cart and Sign In Icon
Updated header when clicking on the More Information button for a group
Settings > Catalog Setting > remove a setting and make it default, bundle type 5 - add to bundle button
Removed the "add to bundle checkbox and replace with a button" setting and made this a default
- **CSS Request: Mobile Optimize**
Updated the Quick Launch function to use a responsive design
- **Lists > Product Lists > Categories - E&O category on back-end, doesn't match E&O category count in catalog**
Fixed an issue where the category count was off between manager and catalog
- **Enhancement: Add Show Password Feature to Log In/Sign In Page**
Added the ability for customer to "show password" when they are logging in to prevent typos
- **Marketing Title Should Work in Search -- Not Only Default Title**
Added the ability for Marketing Title to be searchable

DIRECTORY

- **Directory - If there is no "Directory Address" use the default address and add a message to Groups-
Settings-Directory Settings**
The directory will use the default address if no address is marked Directory Address
- **Directory - Create a new address type "Directory Address" - Customer Side**
Added the Directory Address to be selectable on the customer side
- **Directory - Create a new address type "Directory Address"**
Added the ability for an address to be marked as Directory Address that could be different from the default
address
- **Directory > Update the layout of the page a bit**
Updated the layout of the directory

GROUPS

- **Accounts > Customers > Customer Details > Membership Tab: Approving Membership Dialog**
Updated the text when approving members
- **Accounts > Customers > Customer Details > Membership Tab > Add to Group: Adding a CBM w/o Company**
Added the ability to quickly add a company to a member's record when adding them to a company based
membership

- **Groups > Groups List > Add/Edit Member Group > Membership Tab: Child Group Update #1 of 3**
  Added the ability to prorate a child if joined mid membership period
- **My Account > Membership Tab: Add Ability to Join Child Group Mid Membership Cycle #2 of 3**
  Added the ability to join a child group mid membership period
- **Groups > Free group > can you remove the invoices and payments button**
  Added the ability to hide the invoices & payments button for free groups
- **Groups > When adding a member to a free group - it puts them into pending payment status instead of active**
  Updated the default status from Pending Payment to Active when adding a member to a free group
- **Accounts > Customers > Customer Details > Membership Tab: Expose the Change To Information in My Account**
  Exposed the "Change Group" display so members can see that they have talked with staff about changing member type and when the change will occur
- **Sales > Invoicing > Send Tab: Add Office Phone and Mobile Phone to Column Chooser**
  Invoicing: Added mobile & office phone to column chooser on the Invoicing page

LISTS

- **Evaluation Page Edits**
  Evaluations: Removed dropdowns on evaluations that looked to be editable, but were not, when viewing evaluations
- **Lists > Cert Requirements > Certificates: Include Middle Name in Customer Full Name Message Token**
  Certificate: Added a middle name message token to certificates
- **Lists > Product Lists > GL Classes: Update the Label and Expand the Character Limit**
  GL Codes: Updated the label GL Class to Accounting Class to properly reflect what the field is

MARKETING

- **Marketing > Smart Lists > Detail > Results Tab: License Number Field Pulling Address Line 2 Data**
  Smart LIsts: Fixed an issue where data was mapped to the wrong columns in smart lists

CERTIFICATES

- **Needs for {ClassroomScheduleEarnedCreditStatementsList} certificate token**
  Updated the Classroom Schedule Earned Credit Statement List token to include delivery method, speaker & credentials
- **Allow manager to choose which Classroom Schedule items are eligible to print on overall certificate**
  Added the ability to choose what classroom components appear on certificate

PRODUCTS

- **Catalog > Guestbook Login**
  Guestbook: Updated the guestbook login to recognize a customer that is already logged in
- **Products - Classroom - Schedule Tab - Adding a course - do not populate list of products until staff clicks search**
  Classrooms/Virtual Conference: Updated the add seminar dialog to not populate a list of programs until the search button is clicked
- **My account > Add to calendar button for classrooms not including the account link**
  Classrooms/Virtual Conference: Updated the Add to Calendar function to include a link to the customer's account
- **Manager > Products > Classroom > Portal > Duration Column - Indicated (00:00) in bold red text blank Presenter**
  Classrooms/Virtual Conference: Added red text to duration if 00:00 in the portal settings of a classroom
- **Edit Seminar - CAtegories - Allow category to be unchecked when adding a new category**
  Added the ability to remove categories when adding others to a product
- **Catalog > Products > Classroom > Portal Settings > Faculty - Sort Button**
  Added the ability to sort faculty that have been added to products
- **Products - Related Products / Sales - Add Related Products Dialog**
  Updated the dialog when adding related products
- **Manager > Product with Closed Captioning Not Check Boxed**
  Fixed an issue where a program that was closed captioned was not displaying as such in the viewer settings tab

- **Manager > Duration > Duration in product is Temp Override but CE21 doesn't do this - did this happen via duplication?**
  Manager > Duration > Duration in product is Temp Override but CE21 doesn't do this - did this happen via duplication?
- **Enhancement: Add Select All Check Box Option Regarding Membership Pricing in Webinars**
  Added a select all option for memberships when creating a price adjustment
- **Defect: Product Sales Report - surcharge showing as full price of product when no surcharge exists on product**
  Fixed an issue where a surcharge was being added to product price even if no surcharge had been added to the product
- **Manager > Accounts > Zoom > Attendance Information - Customer has two entries - same email / name**
  Fixed an issue where a deactivated record was appearing in Zoom Attendance information

REPORTS
- **Registration Report Missing Viewing Data -**
  Registration Report: Fixed an issue where viewing data was not being pulled into the registration report when time tracking was not a requirement
- **Reports > Reports Lists > Product Detail Report - New Column – Registrants**
  Product Detail Report: Added a Registrants column to the Product Detail Report
- **Slow Load Inquiry: Reports > Best Sellers - This report seems to be sluggish**
  Best Sellers: Updated the date filters and time frame restrictions on the Best Sellers report
- **Reports - Zero $ Sales - Add number of hours**
  Zero Sales Report: Added a Total Hours column and updated the data pulled in the Presenter Duration column for the Zero $ Sales report
- **Reports > Form Submission report not reporting on any answers**
  Forms: Fixed an issue where the Form Submission report was blank
- **Sales > Orders > Edit Order: Paid Offline Option for Orders That Are Paid Outside the System**
  Product Sales Report: Added the payment method Paid Offline to the product sales report

SALES
- **Catalog > My Account > Donations Tab > Payment Details: Payment Option Not Displaying the Correct Option**
  Donations: Fixed an issue where the correct billing cycle was not displaying for donations
- **Sales > Orders > Edit Order: Typo on the Paid Offline Message**
  Orders: Fixed a typo when marking an order as paid offline
- **Pay by PO or Pay by Check needs Pay with Gift Card**
  Orders: For Check & PO orders updated the Convert to CC button to Convert Payment Type to select CC, GC
- **Error using gift card with small balance**
  Orders: Fixed an issue where an error would occur when using a gift card with less $1 balance
- **Inquiry: Bundle Banners not appearing in catalog**
  Bundles: Fixed an issue where bundle banners were not displaying

SETTINGS
- **Enhancement: Remove Up/Down Arrows and Replace with Grabbers**
  Customer Settings: Added drag & drop functionality to reorder customer custom fields
- **Settings > Support Settings > new "Guidelines" tab to display customer support messages in specific spots in manager**
  Support Settings: Added a Guidelines tab to Support Settings so tenants can provide the CE21 Support Team with information on how to handle specific situations
- **Settings > Support Settings > Phone and Email Display -- Drag and Drop Needed**
  Support Settings: Added drag & drop functionality to reorder support phone and email

VIWER/PRESENTER
- **Catalog > Launch Webinar > "The program has ended" message on PESI Webinar**
  Fixed an issue where a Program has ended message was appearing before the program had ended
- **Presenter > Replace Up / Down arrow system for Seminar Media with Drag n Drop**
  Replaced up/down arrows with drag & drop tool in Presenter > Seminar Media