Release Notes & Updates

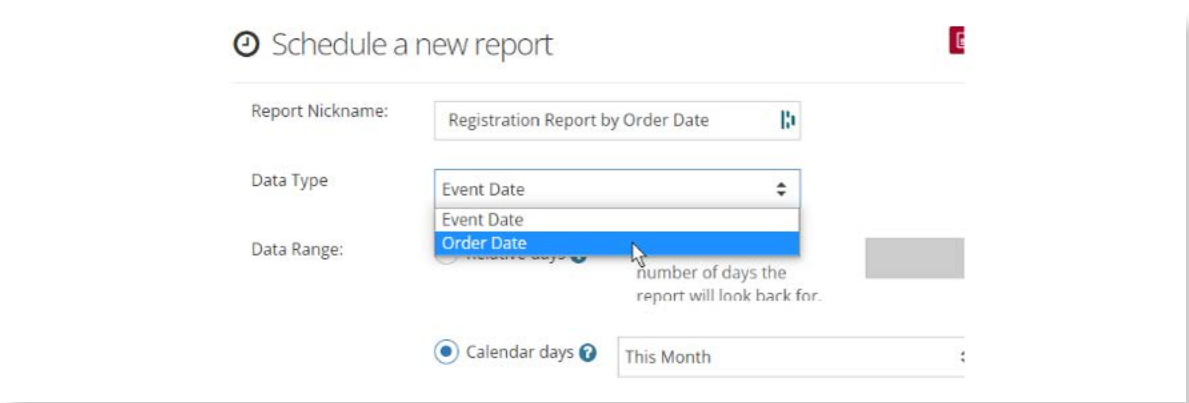
New Features and Updates for the (22.25) Release

Please check page 3 for a list of ALL our new features and updates.
Here are a few updates that we want to highlight. :-)

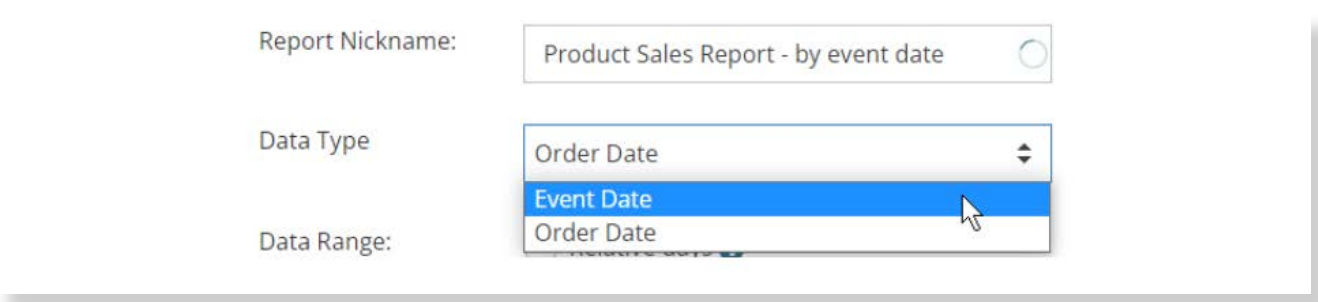
Product Sales Report and the Registration Report

In this release, we've solved a report scheduling problem that has troubled many of you. Now you can choose which kind of date you wish to schedule your report against on both the **Product Sales Report** and the **Registration Report**.

For example, in the Registration Report, many of you have wanted to receive a scheduled report based upon the order date rather than the event date which wasn't possible before now. You can verify which date you're scheduling against in the tool as shown below.

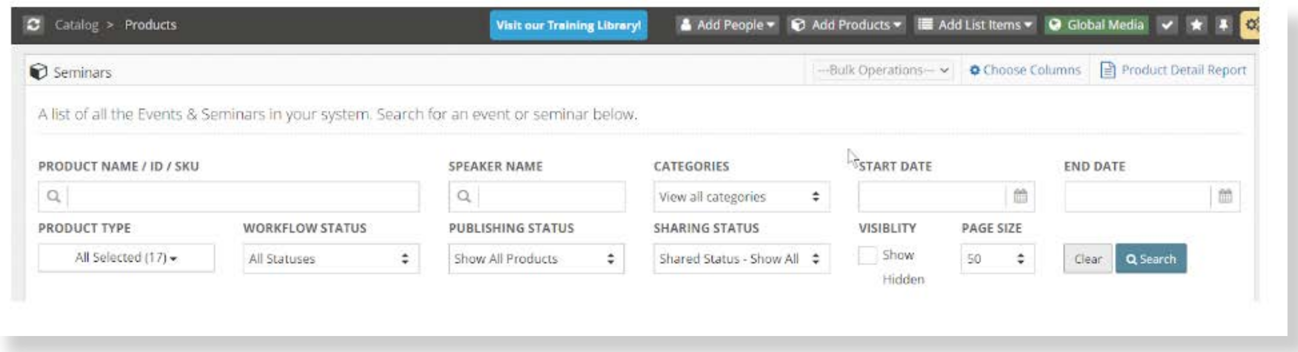


Another update is on the Product Sales Report where you can now schedule against the event date instead of only the order date.



This sort of update will come out on a few other reports in the future where there are two different kinds of dates you can pull the report.

We also want to give you a heads up to the way that the Catalog search page is looking in Manager. Not only is there an update to the layout, but when you click on the Clear button it shows 50 products instead of 5, and All Products, instead of only the Published ones. This kind of update will be coming out on other pages in Manager as well.



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If you have any questions about the items listed in this release, please visit The Exchange and leave a comment.

FULL SYSTEM

MANAGER
- Updated the Help Bucket so that the field labels are more clear.
- Updated the Customer and Speaker search in Manager so that the search is faster and the field labels are more clear.

NOTIFICATIONS
- We have sped up our email notifications and reminders that go out on programs.

REPORTS
- Product Sales report now has a “Item Quantity” Column.
- In our Accounts report you can now pull reports with links to your customer or speaker accounts page in Manager.

SALES
- Updated the Send and Notify button to send the Order Confirmation email template when the “I have already received the check” is checked.

SETTINGS
- User’s Account on Catalog: Fixed issue with the Docs Tab showing incorrectly according to the setting you select.

LMS (Trident)

SALES
- Updated bundles so that it is now more clear when a sold-out program is not available.
- In backend orders, you can now see all price adjustments, even expired ones, so you can honor previously expired prices to users who call you up.

CATALOG APPEARANCE
- Fixed loading issue on Registrant Type question sets when you use the dropdown.
- In widget and on the product sales page, updated Location to include Venue name. Also removed the location information from the date info line.
- In Classrooms, adding the Course title to the Certificate modal that pops up, since there can be many courses within that Classroom. This will remind folks which course they’re reviewing, taking a quiz on, etc.

CERTIFICATES/REQUIREMENTS
- Fixed the issues with “Earned” type message tokens on In Person events. This will now populate based not only on the partial credit given the user, but also based upon whichever credits they have chosen when they download their certificate.

REPORTS
- Registration reports can now be scheduled against Order Date instead of Event Date. You can now schedule those registration reports to send to you based on when they were purchased, not only when the event happened..
- Added a date type chooser on both the Product Sales and Product Sales Summary report scheduling tool so that now you can schedule those reports to be delivered based on either Order date or Event date.
- Updated Completion report so that it shows the Log in and Log out time even if Time Tracking is not required.

PRODUCTS

- When searching for products in manager, we have fixed the Current Registrant column so that it no longer counts the Test registrations.
- Fixed Classrooms so that you can attach Archive Notifications to them.
- Fixed inventory feature so that when you cancel an order, the quantity is added back to inventory.
- Updated the Product Templates so that the field labels are more clear and mobile friendly.

AMS (Lighthouse)

COMPANY MEMBERSHIP

- Fixed an issue where a company's membership status was not passing down to the employees that are a part of the membership.

GROUPS

- Added information about group types to the Group Type dropdown when adding or editing a group.
- Added the Membership Invoice Email Template to the list of selectable templates in the Payment Reminders Rules area within the group, so that an invoice can be sent with the notification.
- Added the Pending Requirements status to list of member statuses you can choose when you email members in the Group's member list.