



Release Notes & Updates

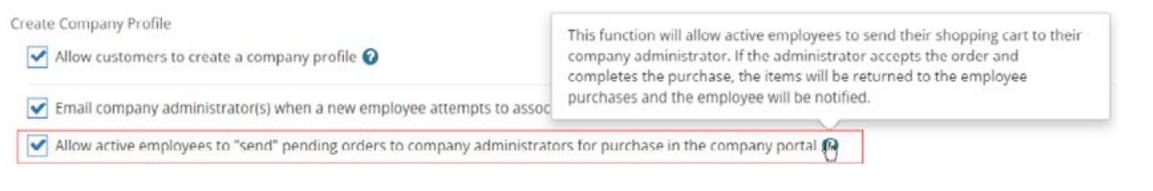
New Features and Updates for the (23.3) Release

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

Shopping Cart Updated for “Pay by Company”

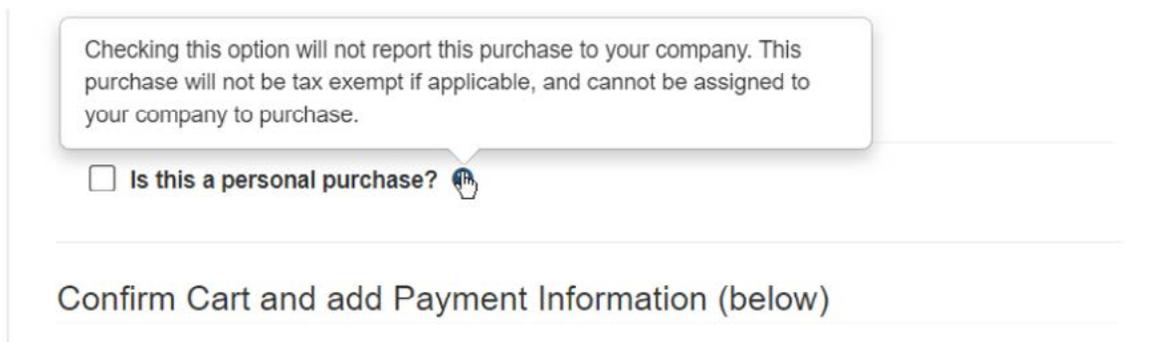
We are thrilled to announce our updated shopping cart experience for “Pay by Company.” So often, your users do not pay for their memberships or products; instead, they need to send that purchase to someone in the company to pay. We have a setting that will allow that payment option if the user is an approved company employee.

To use this feature, you must go to Settings > Company Settings. There you will find many [Company settings](#), but the one to enable this “Pay by Company” feature is outlined in the image below.



Selecting that will give the user an option on the final page of their shopping cart where they can:

1. Mark this order as a “personal order.” Sometimes your users may be taking courses with sensitive information, so we allow them to keep their programs private if they wish to. Clicking this removes the Pay by Company option.



2. If they do not mark the order as personal, at the bottom of your catalog’s list of payment options, there will be an option the user can select to send this order to their company admin.

 **My Company paying for this purchase**

This purchase will be assigned to your company to pay for. If approved by your company admin, these items will show in your Purchases tab on your account. Please contact your company admin with any further questions

Once they do this, the screen will indicate to the employee that they have a pending order, with a link to take them back to their account or the catalog home page.

This item(s) has been sent to your Company Admin for Approval. Please Contact your Company Admin with any questions. [Click here to return to your account.](#) [Click here to return to catalog homepage.](#) ✕

The company's administrator will be alerted via email that there is a requested purchase in their company portal. Then, they can log into their account, find the pending purchase, and then either apply payment or reject the purchase.

If the order is accepted and paid, the user will be alerted via email, and they can then find the program within the product tab in their account.

If the order is rejected, the program will be stored in their saved programs, which shows in their account and on the first page of the shopping cart so they can easily purchase the product themselves the next time they go to the catalog.

Previously Saved Items

Event Date	Title	Credits	Price
07/10/2020 12am to 12:9am CST	On Demand Course 5 Add to Cart » More Info Remove	Credit Tracker information	\$20.00 Reject By Admin

More features we plan to create for this are a set of alerts in the user's account reminding them that they have a pending, rejected, or accepted company purchase. So keep your eyes peeled for that a couple of months from now.

If you have more questions about this or any other Company Settings or features, please open a [Help Bucket ticket](#), and we will be happy to fill you in on the other cool things you can do with your users' companies.



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If you have any questions about any of the features or functionality this release please submit your comment or question via the Help Bucket in Manager and a CE21 Team Member will be in touch.

FULL SYSTEM

SALES

- For Pay later, Pending Check, and Pending PO orders, users have always been able to pay by another method within their product list or within their transaction tab. We have updated this to include ACH if your ecommerce has that enabled.
- Reworked check out process involving company purchases. See the release highlights.

LMS (Trident)

CATALOG APPEARANCE

- Mobile Catalog view: Fixed issue where a very long list of Categories didn't scroll correctly.
- Corrected how webinars with multiple dates plugged into the event dates displays in the calendar, rather than one long chunk of days in the calendar. PLEASE NOTE: Time tracking will not work with multi-day webinars.
- Live Event: For a live event that has incongruent days, the calendar will now correctly reflect that, rather than one long bar.

CERTIFICATES/REQUIREMENTS

- Fixed issue with weekly and monthly Product Notification emails not sending.

MARKETING

- Marketing > Reward Points: There is now an option to Exclude Additional Participant CE / Purchase CE Credit from being used in conjunction with rewards points.

NOTIFICATIONS

- Fixed issue with the Add To Calendar so that those always match whether you add to calendar from within the account page, or from email or from within a classroom or conference.

PRODUCTS

- Complex Live Events: Fixed issue with those message tokens that add up your credit so that they weren't relying upon the setting "Display on Customer's Attendance Confirmation" to work.
- Product Templates: Staff now have the ability to preset workflow statuses for product templates as well as attach documents or links in the Internal Resources tab.
- We continue to work on the slowness when pulling the Current Registrant lists within the Information tab. It's an on-going issue we're trying to speed up.

REPORTS

- Updated backend sales: Whenever you manually changed a product's price and leave a discount note; that note will now show in the Product Sales Report in the Price adjustment column. You can also edit that note now, in the Order details page.
- Updated Registration Report to include Order ID.

SALES

- Fixed issue with Quick Register that allowed users to sign up multiple times regardless of the setting that allows that or not.

VIEWER/PRESENTER

- Various updates to the way that the chat is laid out to be more appealing and easier to use.

AMS (Lighthouse)

GROUPS

- Grayed out renewal period in groups so it's clear that it can not be changed.
- When you are transferring ownership of a company based membership, there are now more options when you transfer that to a different user to keep them in the company or remove them from the company.