## New Features and Updates for the (23.5) 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. :-)**

You'll find in this release we have fixed several issues that you've sent in, but we've also created quite a few cool features we don't want you to miss!

The first is the ability to build a template from a program you like. For example, you create an event from scratch and think, "I wish THAT was my template!" Well, now you can make that happen! Just go into the General Info tab of that product family, and there is an option to "Create Template."
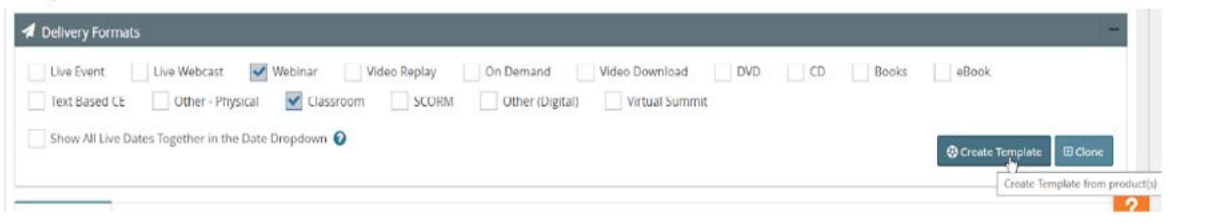
Our second cool update is the ability to prevent your users from purchasing a product in the same product family. For example, if they've registered for the Webcast of an event, this setting could restrict them from registering for the On Demand of the same. You can also use this for Classrooms or Virtual Conferences if the modules share a product family with the Conference. Find this setting within the **Catalog Settings > Product Settings**.

This setting also has a site message that you can edit. This message will show on the product detail page whenever they go to a different product within the same product family of a program they've registered for. This is called the "Same Product Family Purchase" message in **Catalog Settings > Site Messages**.

You can also override this default option you set at the product family level within the General Info tab.

One important thing to note about this setting is that it is only a product change going forward. As you build new products, this will be the setting they use. Please ensure that if you're cloning products, you review the setting within the General info tab before you clone to get the proper setting. So that we didn't change anything on your catalogs, we defaulted this to work as our system always has, which is to say we defaulted to allowing.

We finally wanted to highlight a cool bulk operation that we added to the Current Registrant's list (in the product's Information tab). In a recent release, we added a way to set the Expiration date on a Sales Import. We've now given you another way to edit those dates within the Current Registrants list in a product.

Please note if you change an expiration date in this way, any changes to the general settings on a product or your catalog will not affect the orders you have updated in this manner. It sees those as manual updates, and those do not get updated when you simply change the expiration date on a product or your overall catalog settings, even though it asks if you want to change it on all previous orders. It will only update those orders that have not been manually edited.

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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

ACCOUNTS
- Removed the unnecessary and non-editable phone numbers in the address block in users' accounts. That information is found elsewhere within the account.
- Fixed an issue in the customer search page in Manager where the custom field information was showing blank incorrectly.

OTHER
- Fixed a variety of typos. If you ever find a typo, please open a help bucket ticket and let us know!

SALES
- Fixed an issue where Canceled checks and Canceled POs were disappearing from the user's account entirely. Now it will show in their Transaction history on the catalog.
- For pending checks, POs, and Pay Later orders, you can now use the Virtual Terminal Payment option.

SETTINGS
- Fixed an issue where the column headers on the Customer search weren't matching the updated labels created in Customer Settings.

LMS (Trident)

CATALOG APPEARANCE
- Fixed an issue regarding the display duration on our new card view account page layout.

CERTIFICATES/REQUIREMENTS
- Fixed an issue where Mandatory/Optional labels weren't displaying on the agenda based evals correctly in manager, in the certificate accordion.
- Fixed an issue preventing editing a Customer's agenda selections if it was the first requirement.
- Fixed an issue that required users to click into certificate modules in order to complete Zoom Poll Cert requirements.

NOTIFICATIONS
- Fixed an issue when trying to schedule same-day emails.

PRODUCTS
- Fixed an issue where PDFs were not rendering properly within Text Based CE products.
- We now have the ability to create a product template from an existing product family. Find this new "Create Template" button on the General Info tab in your product family.
- Updated the Speaker Portal document upload feature to allow for a larger filesize and zip files.
- Fixed a search issue when adding speakers on a product so that you can search by first name then last name rather than only the way it is presented in the results.

REPORTS

- Created a new report to show Jurisdiction Completion results: Jurisdiction Credit Report. We're still working out a few of the results on this report though.

SALES

- Fixed an issue with one-time + Automatic discounts not working as they should.

VIEWER/PRESENTER

- Fixed an issue so that when you select HD in the Live Webcast Presenter, it doesn't reset.
- Fixed the issue where dropbox wasn't uploading the videos properly.

AMS (Lighthouse)

ACCOUNTS

- Fixed an issue where a note wasn't getting added when staff changed member status.

GROUPS

- Added ability to preview changes as well as revert to previously saved versions of Landing Page on Groups.
- Fixed location of help text on Group Question set Acceptance question