RELEASE 23.8

Release Notes & Updates

TRIDENT • LIGHTHOUSE • REGATTA

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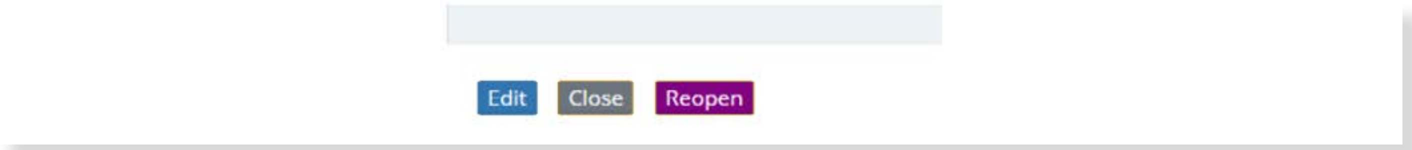
VP Product

New Features and Updates

Please check page 4 for a list of ALL our new features and updates.
Here are your highlights for Release 23.8.

Changes to the Help Bucket

Related to our last release regarding the Help Bucket updates, we now have provided a quick “Close” button on the Help Bucket so you can close any ticket that CE21 has resolved for you. You can find that in this area within the ticket (towards the top, before the notes on the ticket).



New Search Style Widget: Credit Types

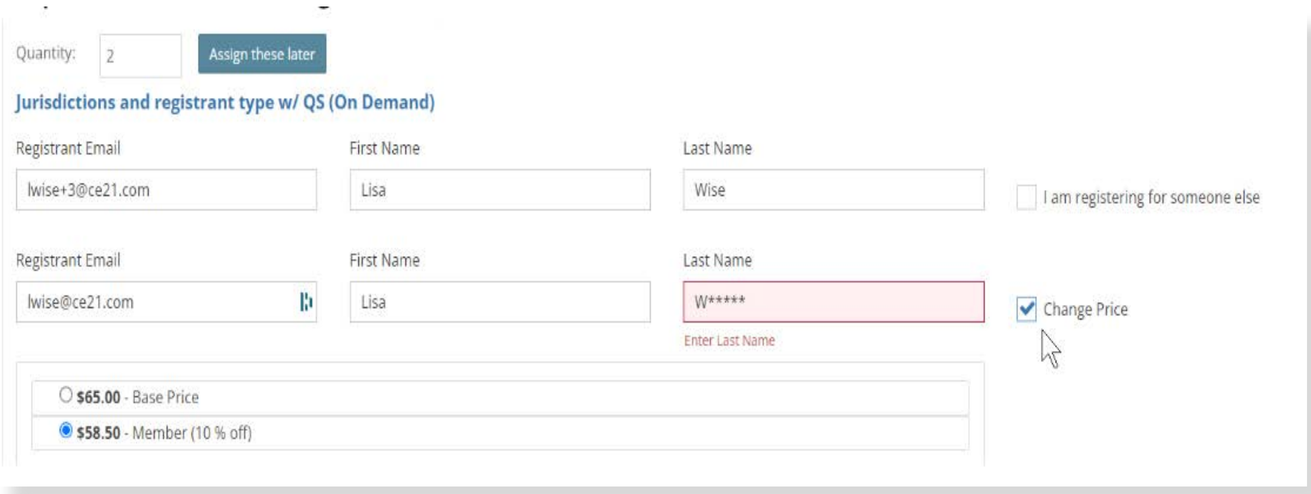
We created a “Credit Type” widget within the “Search” widget options, which can include product counts and be displayed as a dropdown or a list, much like our other Search style widgets. Feel free to play around with this to see how it shows on your catalog. It will only display the active credit types on products published in your catalog. Here’s what it looks like in our demo catalog as a dropdown:

To learn more about this new widget and all the other widgets you can use to create your catalog, check out this user guide or this program where Lisa explains how to manage your catalog appearance.

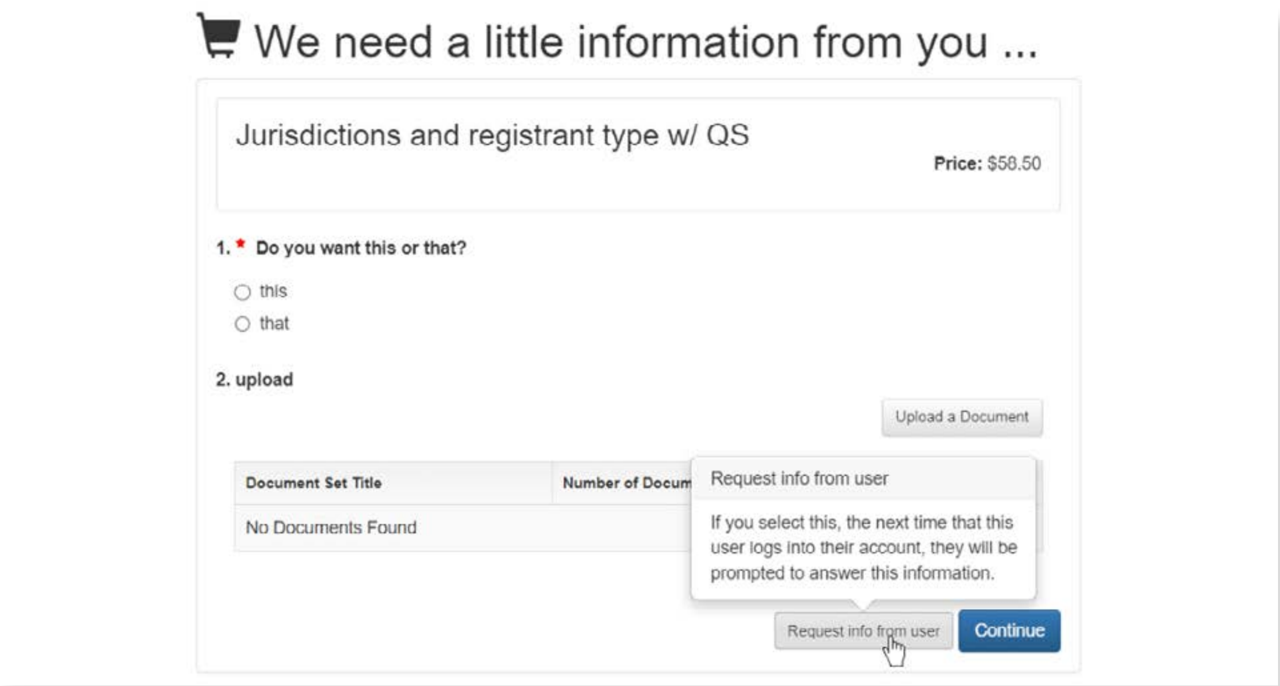
Multiple Registration Updates

Lately, we’ve been working on several updates to make multiple registrations easier for your users in various scenarios. While we still have some work to do, things are getting better all the time. For example, we are finishing up the ability for members to purchase programs for other members, not just price adjustments unassigned to a group/membership. Currently, multiple registrations are available within the Manager for orders taken on the backend but not yet available on the catalog. We expect to get that out on the catalog in our next release. Until then, please feel free to use this if you're registering multiple people with different membership levels and price points when placing an order on the backend.

To use this, when you raise the quantity on the registration information page and add a person's email address, we will look up their membership (or lack thereof) and offer you the different price adjustments they are allowed based on their access. For now, you will need to select the "Change Price" option, but we expect to make that more automatic, especially when we put it into the catalog.

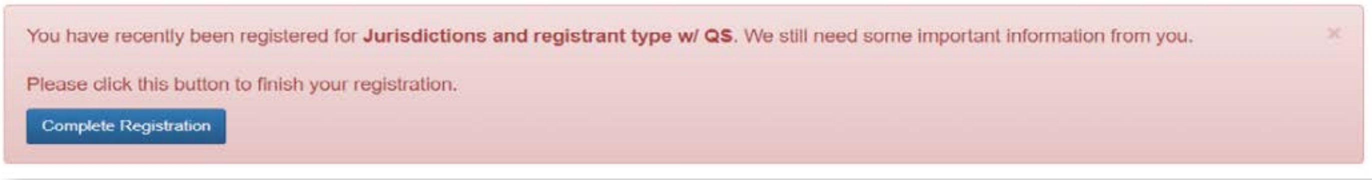


We are also excited to announce that you or your users can now register multiple people for programs with **Registrant Type Question** sets. To learn more about how to set up a product using the Registrant type feature, [please review this article.] With this update, when a user ups the quantity on a product with a Registrant Type Question set within their shopping cart, a message will pop up asking them to either answer the Registration form for that user or to request that user to fill the form in themselves.



If they bypass to let the user fill it in themselves, that other person will receive an email telling them to complete their registration. The template for that email is called "User Registration - Finish Registration Form."

When that user logs into their account, a red warning will ask them to complete their registration.



Finally, within the product, in the Registrant Types column, you can see the status of the Registrant Question Set if it is still in Pending status, and when you can click on the hyperlink there, you will be able to email the user. The above template and any other templates you've edited will be available within that tool.

Note that this feature works best within the catalog, but we're working on perfecting it for orders taken in the Manager. Please keep in mind that until we get the above member price adjustment added to the catalog, the extra users on a program must use the same price adjustment. That will be updated soon, though.

In the next release, we plan to finalize the above two features and add a similar feature for Live Events with Agenda Registration Question sets. Thank you for your patience as we perfect these much-awaited purchase options.

Final Note

Thank you for filling out our Development Priorities survey! We greatly appreciate your participation and feedback. If you missed the opportunity to respond, we will be sending another one in a few months. If you did not receive the survey link, please sign up for our newsletter. We will also announce it within the Manager.

The development team will be reviewing your feedback as we plan our upcoming releases. We plan to share the results with you so you have an idea of the cool new features we'll be building. Early results show that an overwhelming majority of you want catalog and accessibility updates, so we've grabbed several of the updates we already have in the pipeline and have started working on those for our next release.

PS: Refer a friend to CE21's Technology Showcase (5/10/23 @ 11amCST) and be entered to save $300 on your next CE21 Invoice! Refer by sending this link to the CE21 Technology Showcase. **Each referral will count as an entry for your organization into a drawing to receive a credit of $300 on your next CE21 invoice. The winner will be selected by Friday, May 12th.**

Release Notes & Updates

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New Features and Updates for the (23.8) Release

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

- Fixed issue where users' bios were getting wiped out sometimes.

CATALOG APPEARANCE

- New Search Widget: Credit Types - This new widget will allow you to list your credit types on any page on your catalog so your users can find courses related to the credit type of their choosing.
- Made some improvements to the way the FAQs on your catalog look. Easier navigation and larger pop ups, as well as a way to open the article in a new tab.

HELP BUCKET

- **Added a button to quickly close resolved tickets in the help bucket.**

IMPORTS

- Fixed issue with importing users' Account Tags using the import tool.

NOTIFICATIONS

- Notification Settings: Now there is a way to turn off SMS messages entirely if you never want to send them out. We also cleaned up the SMS notification area on the catalog that your users see.

REPORTS

- Added the new custom address blocks to the Accounts and Group Members reports.
- Updated the Product Sales report so that it properly reflects cancelled Pending POs, Pending Checks and Pay Later orders when you check the setting to Show All Transactions. This way you can see on the report when a pending order is cancelled. We have also corrected the Payment Received column for those Pending orders to show $0 correctly, since you have not actually received that money.

SALES

- For orders refunded to gift cards, those gift cards can now be refunded into a check. In order to see the refund to check option, make sure you have enabled refunds to check in Settings > Eccomerce settings. As always, you will need to issue that check yourselves.

SMART LISTS

- Fixed the issue that was clearing out Smart Lists.

LMS (Trident)

CATALOG APPEARANCE

- In the new Upcoming Live Programs widget, we no longer show the country of the location unless the country differs from the country where you are established.

LIVE EVENTS

- Fixed defect where badge group information was showing in the Current Registrants list on a product even though none existed.
- There is now a way to edit the HTML, using the source code, on the Agenda item details.

- Fixed issue on the Agenda Export where the credit column was only exporting 500 characters.
- Handout update which allows you to organize handouts based on the Agenda they're attached to so that the handouts are more organized in the users' handout buttons.
- Now you can add HTML badges to your templates so you don't have to recreate those for each live event. Find those in Lists > Product Lists.
- We updated the Badge message tokens to be clickable, like they are in emails and certificates. We have also sorted them so they're easier to find, and have included all Customer custom fields as new message tokens.

PRODUCTS
- Fixed an issue where all video replays with registration question sets were adding multiple dates on the order in Manager.
- Fixed issue preventing email reminders from being duplicated when you duplicate a product.
- Fixed issue with quizzes being made available before showtime.
- In the Current Registrant list within a product, you can filter users based on price adjustments. You can then use this selection to print badges, email registrants, update expiration dates, etc.
- Registrant Type question sets: Created an email that gets sent to the user when someone else registers for them and bypasses the registration form. This alerts the user to log in and complete their registration.
- Registrant Type question sets: Updated the Current Registrants table within the product which allows you to see at a glance if there are any registration forms not filled in, and allow you to easily email the user if that's the case.
- Registrant Type question sets: We have made it so that a user can register someone else for a product with a Registrant Type question sets and either answer that immediately, or send a request to the user to have them fill it out.

SALES
- New Ecommerce Setting: For Pay Later orders, similar to pending checks or POS, you can now give the users access to the program, but not the certificates, before the order is paid in full.
- Reorganized the Price Adjustment Template to be a bit easier to understand.

SETTINGS
- We have updated our Zoom integration to use their latest API requirements. This is in advance of their June cutoff for the existing service. Our Webinar integration instructions have been updated and we will send you more details about this very soon.

AMS (Lighthouse)

COMPANY GROUPS
- Added a setting to company-based members that will allow employees to be auto-added when using only the base group price setting.

DIRECTORY
- Fixed the Directory so that the results make more sense when searching by the zip code. Also fixed the size of the map based upon the size of the area that you're searching.
- Minor updates to the Directory search results appearance.

DONATIONS
- Added the ability to default an annual donation split into multiple payments, i.e., if you want your members to donate a custom amount but have it broken out into monthly payments.
- Fixed an issue where the donation's description html appeared on the invoice instead of the donation name.

GROUPS
- FAdded audit logs to groups to see who last edited settings and information within the group.
- Added the ability for Child Groups to use group question sets.
- The "Member Since" date is now combined with setting a group number and we have made this easier to understand and added the ability to hide the group number if it is not needed. Find this in the Group Type settings.

NOTIFICATIONS
- Added message tokens for {PaymentStatus}, {GroupTitleTable}, and {Billing Cycle} to the staff notification for the group purchase email template. The {GroupTitleTable} token will show staff all the groups the member opted into when joining. The use case for this token is when members can join child groups after selecting their primary membership.