Please check page 6 for a list of ALL our new features and updates.
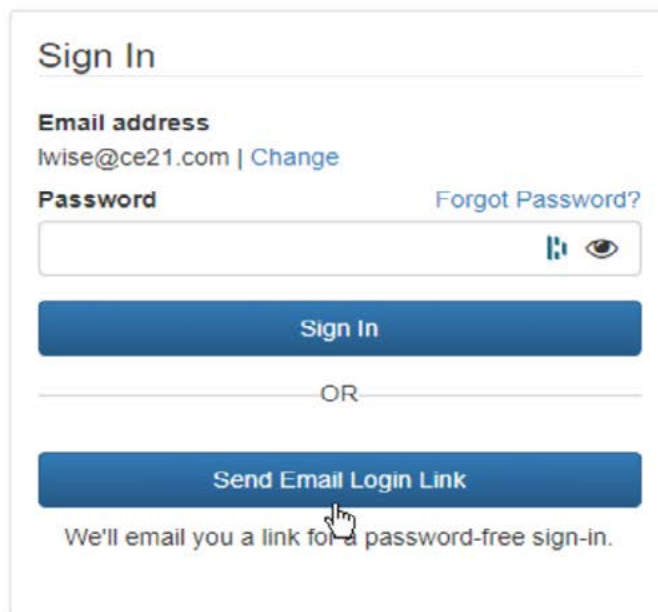Here are your highlights for Release 23.10.

Quick but important note

One thing we don't want to get lost with all the fun new features below is an update we recently made to $0 orders. You can now refund a $0 order rather than simply deactivate them, and we recommend you use the refund tool rather than the deactivation option going forward. This information will be available in reports and the API.

Lisa Wise
VP Product

Significant Catalog Updates

We've got a couple of substantial catalog updates we've been working on that we're excited to share with you!

Magic Link

Now, your catalog is one of those cool websites where you can get a "magic link" sent rather than always remembering your password. When your user gets to the sign-in page, they will enter their email address and, from there, be asked for their password or if they would like to get a magic link sent to them instead. Once they choose the second option, an email is sent their way with a handy link that drops them directly in their account page.

If you want to turn this feature off, you can find that in the Catalog Settings. This will not apply to you if you are a Single-Sign-on client who never uses the CE21 sign-in process, not even for guest accounts.

Updated Shopping Cart

We have made some pretty significant changes to the Shopping Cart to align with what you see on the internet nowadays.

Firstly, we've broken the Shopping Cart into two different areas in **Appearance > Layout** for you to edit separately. The "Shopping Cart" is the first page where you review what is in your cart, but you can easily navigate the catalog from here. We have updated the layout to be more modern and straightforward for the clients to navigate. It also looks better in mobile view since everyone shops on their phones.

From the Shopping Cart page, the user can either continue shopping or Proceed to Checkout. This Checkout is a new area you can edit separately in the **Appearance > Layout** area within the manager. This area represents the rest of the checkout process, including Registrant Info, Shipping Address, and the final Checkout page. We removed much of the catalog experience so that you keep them focused on the task at hand: paying you money! There is an edit cart that will take them back to the catalog at any time, but this "captive audience" checkout style is standard across the internet.

Reporting Updates
Sticky Columns

This may be my favorite report update so far! We will make all report columns you choose "sticky" based on your selections. Say you always want the same columns in your Registration Report. How annoying is it to have to choose those columns each time? Sure, you could save the report, but that seems a bit "extra." Starting with this release, we will remember the columns you last selected on that report. When you visit that report again, it will remember what columns **you** chose last time and start you off with them. Your coworkers will have their own "sticky" columns remembered from their previous selections. We will update all of them, but in this release, we have made this change

for the following reports:

- Accounts Report
- Product Sales Report
- Transaction Report
- Group Members Report
- Company-Based Membership Report
- Completion Report
- Product Detail Report
- Registration Report.

We prioritized those that are the most used. We need to spread this update among the next several releases, but we can ensure your favorite is at the top of the list if you let us know. In future releases, we'll let you know which reports we update in the standard release notes area.

Default Dates

To make it easier when pulling your reports, instead of giving you an error when you leave the date range blank, we will now fill in the last month in the date range on the reports. To avoid this, start by filling in the dates you know you will want. We have made this change on most reports, except those that did not require a date range already.

Live Events: Register for another user (Non-Member Pricing*)

We now have the ability for a user to register another user for a live event and either make the agenda selections for the other attendee or assign that to the attendee to do themselves. This is similar to the recently released Registrant-Type Question Set pop-up update. See the **release notes from 23.8** for more information about that recent change.

The purchaser must answer the first agenda question set, but when they get to their shopping cart, they will be able to raise the quantity of that, and then they'll have the opportunity, later in the checkout process to answer or bypass the question set for the other user. You will find that the user cannot change the quantity at this phase of the shopping cart process, but if they navigate to the first page of the shopping cart, they can change the quantity there at any time.

The image below shows the shopping cart with my initial purchase. I can change the quantity here:

Changing the quantity will add a new live event item to the cart. The purchase will be asked for the agenda information on the Registrant Confirmation page later in the checkout process.

In the Registrant confirmation, this is what the users will see:

At the bottom of the agenda selector tool, there is an option to "Request Info" or fill it out for the registrant.

As with the recently updated Registrant Type question set, the pending agenda user will receive an email requesting they log in to make their selections and finish registration. Once they are in their account, there will be an alert at the top of their account where they can complete their registration.

Within the product on the Current Registrant table, there is also a way for you to find these users who still have pending Agendas and email them by clicking on the link in the column. That column is the new "Agenda Status" column.

| Total Selected: 0   Total Registrants: 4 | | | Total Revenue: $280.00 | | Export Agenda Selections | Choose Columns | Email Registrants | Bulk Operation ▾ | Generate Gift Cards | CSV |

	Purchase Date ▾	Registrant First Name	Registrant Last Name	Event Date	Email	Base Price	Price Paid	Agenda Status
☐	06/14/2023 (CDT)	John (test)	Davis (test)	12/27/2023 08:00 AM (CST)	john@ce21.com	$100.00	$100.00	Complete
☐	06/14/2023 (CDT)	Braden12 (test)	Davis12 (test)	12/27/2023 08:00 AM (CST)	bdavis+12@ce21.com	$100.00	$100.00	Complete
☐	06/14/2023 (CDT)	Braden13 (test)	Davis13 (test)	12/27/2023 08:00 AM (CST)	bdavis+13@ce21.com	$150.00	$150.00	Complete
☐	06/13/2023 (CDT)	Braden118 (test)	Davis118 (test)	12/27/2023 08:00 AM (CST)	bdavis+118@ce21.com	$100.00	$100.00	Pending

If their agenda selections require additional payment for meals or events within the agenda item, they can pay by credit card immediately. If the registrants make a mistake with their agenda items as they check out, don't forget we recently added the ability for you to edit their agenda items within the order. We reported on that feature in our **last release**.

*Note: This still doesn't allow non-members to register for members or vice versa, but if you are not using membership validation in your Price Adjustment, this will work great. Never fear, that is the next thing on our list to have built, and we're working on it right now.

On the Horizon

We have taken you Developmental Survey Results seriously. Your top five choices of areas within our tools to have updates were:
1. Reporting
2. Catalog Updates
3. AMS/Membership Management updates
4. Live Event Updates
5. Manager updates (Backend)

There was a pretty clear top five among the results, after which the votes tapered off pretty dramatically. That is not to say we will not toss in other things you've submitted related to those other topics, but we will focus our energies on these big projects. Due to these survey results, we've prioritized our projects over the last three sprints in the following ways.

For reporting, we've been working on many of your reporting requests and made changes like default dates and sticky columns and adding a variety of necessary columns. We are investigating how we can accomplish the reports that you can build for yourselves. That seems to be an option that would solve many of your problems, but it is tricky. We have got it on the roadmap now, though. Until then, we will do our best to make the reports as easy to use as possible.

For Catalog Updates, we've been focusing on ADA compliance and accessibility concerns, Shopping Cart modernization, Magic Link login, and various widgets and FAQ updates. Soon, we're looking into removing an unnecessary step of the shopping cart and other fixes or modernizations along the lines of what we've done recently.

We have been addressing issues in reporting and directories for the AMS updates and making various changes for Company-based Memberships. The most exciting feature we are currently working on for AMS is our Classified Ads tool. We've begun development on that and hope to have that for you in Q3 at the latest. We're also considering creating an easier way to set up those membership groups.

We've wanted to work on live event updates for a while, and they have been one of our more significant priorities internally. So far, there have been significant changes, including badge templates, editing the agenda items on an order, and registering another user with a different or pending agenda. Future items include triggerable Agenda items, easier-to-use templates, and, further down the line, an on-site attendance tracking tool, complete with QR scanning.

As for the Manager updates, we've not gotten too far down the road with the changes we are considering there, but we started by adding our navigation search tool in our 23.9 release. We understand that Manager is constantly changing and can be challenging at times, and we already have a few things in our roadmap that should help alleviate that, such as being clearer on what needs to be saved on a product when you make changes on a product.

New Features and Updates for the (23.10) 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_____

ACCESSIBILITY
• Accessibility update that makes the My Account page tabs easier to navigate on a screenreader.
• More accessibility updates to allow screenreaders to better navigate the Account Product list features.

CATALOG APPEARANCE
• We have created a way of logging in with a "Magic Link." See highlights for more information.
• We have modernized our Shopping cart and created a separate checkout area. See highlights for more information.
• We have resolved the issue with the display of Gift Cards in the user's Gift Cards Discount Tab. The Initial Value now appears correctly. We also include more information in the usage history tab about the refunds.
• We have updated the Solutions feedback widget to maximize the real estate to show articles without having to launch into another tab.

MANAGER
• We have resolved the problem where the unauth link in support tickets was incorrect. Previously, clicking on the link would take you to the login page instead of the intended program.

REPORTS
• For those of you who use our API, we have added the External Order ID to the Transaction, Product Sales, Completion, and Registration reports. We have also relabeled the existing External ID to External User ID in those reports to be clear which you are requesting.
• In most of our reports, you will notice that we have filled in a date range for your convenience. This means that if you make any updates to the columns and save them, you will receive information instead of an error message. Of course, you always have the option to modify these dates if needed.
• It is now possible to refund orders that amount to $0. It is advisable to opt for this option instead of simply deactivating a product on an order. Refunding creates a record that is useful in APIs and Product Sales reports.
• STICKY COLUMNS! Certain Reports now remember the columns you most recently selected: Accounts Report, Product Sales Report, Transaction Report, Group Members Report, Company-Based Membership Report, Completion Report, Product Detail Report, and Registration Report. We will do more reports in our upcoming code releases.

SALES
• We have fixed the problem where users would see automatic discounts in their shopping cart that were no longer valid for them to use. Users will no longer see these limited discounts when they're no longer able to use them.

LMS (Trident) _____

ACCOUNTS
• We have resolved the problem where users could not download documents that were provided as part of the Registrant Type Questions sets from their account's Docs tab.

CATALOG APPEARANCE
• The discount page was enhanced by including pop-ups for purchase alerts, add-ons, related products, and agenda selection. Additionally, the option to send items directly to the cart from the discount page was added as an option you can set within the Discount.

- We have fixed the Event Calendar in the catalog to better handled disconnected dates on Virtual Summits.
- We have resolved the problem with the credit tracker not saving credits that had expiration dates.

CERTIFICATES/REQUIREMENTS
- We fixed the Credit Specific tokens in Certificates and Documents to use the Credit Label instead of the Display name.

LIVE EVENTS
- Live Event attendees can now add a second attendee and either choose the agenda items for them or send a request to have them fill it out later on.
- The Badge Print All and Print Selected feature has been improved to sort the PDF results in the same order as the Current Registrant table.
- The problem with downloading badges has been resolved. The download process now correctly generates a pdf file.
- There is now a setting in the Agenda items which will allow you to create an {Agenda} message token which can be shown in order confirmation email and all of the Event Reminders templates.
- We have resolved an issue that occurred in the program manager when using the Customer Agenda Selections. This problem did not affect the catalog and users did not encounter any difficulties with it.

NOTIFICATIONS
- We have improved the Communications feature in the Product. It now clearly differentiates between Sent and Scheduled emails and accurately displays the sent date. This update only affects scheduled emails created through the tools in the Current Registrant table and does not apply to the Email Reminders feature..

PRODUCTS
- Fixed issue where Account Class was not getting carried over when duplicating a product.
- The problem of programs being oversold has been fixed. The issue was caused by "base price" registrations not being included in the Max Registrant count. This has been corrected, and now all registrations, even speakers who are auto-registered, will count towards the limit of Max Registrants.
- The problem with the webinar id details not appearing on the webinar settings tab for the new Zoom S2SOAuth integration has been resolved.
- We have fixed the Bulk operation Update Expiration tool so that it now also updates expiration dates that have already passed.

REPORTS
- New columns added to Registration Report: Registrant ID and Registrant County.
- We added three new columns to the Product Sales Report: Registrant License, Registrant Fax & Handling

SHARING MARKETPLACE
- We have made it easier to search for products on our Sharing marketplace by populating the updated search results without having to hit the Go button after selecting your Category, Industry, or Media Type.

VIWER/PRESENTER
- We have resolved an issue with Transcripts that previously prevented them from taking you directly to a specific spot in a video if there were multiple segments in the program.

AMS (Lighthouse)_____

ACCOUNTS
- The system now adds an automated note when a member renews their membership before the system automatically renews it for them..

REPORTS
- We have added a payment method filter and the ability to choose custom fields in the column chooser to the Accounts Receivable report.
- We have updated the Group Members and Company Based Membership Reports by adding a column for Renewed On Date in the column chooser.

SMART LISTS
- When using a date type field in smart lists, we have made it easier to select a date range and resolved some issues where it was returning too many results.