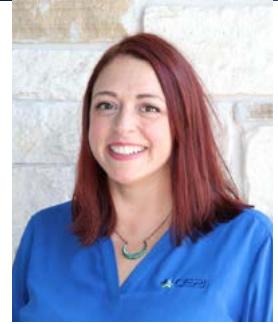


# RELEASE 23.11

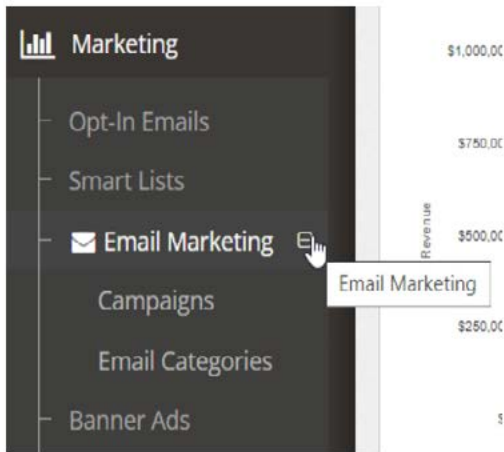
Here are your highlights for Release 23.11. Please check page 4 for a list of ALL our new features and updates.



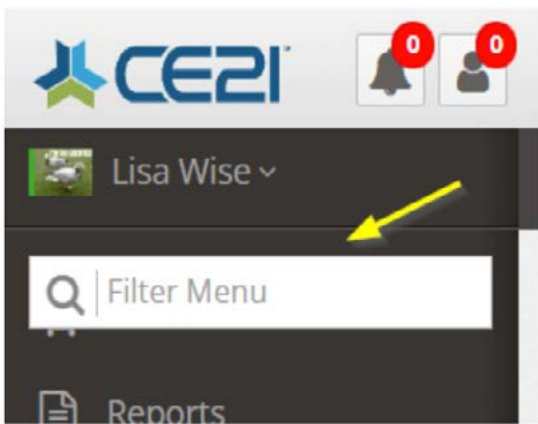
**Lisa Wise**  
VP Product

## Quick Navigation update

We want to quickly draw your attention to the new location for the Email Marketing tools. We have moved those tools into the Marketing menu in the sidebar.



Don't forget; you can quickly find a page using our Navigation search tool in the top left corner of the Manager.

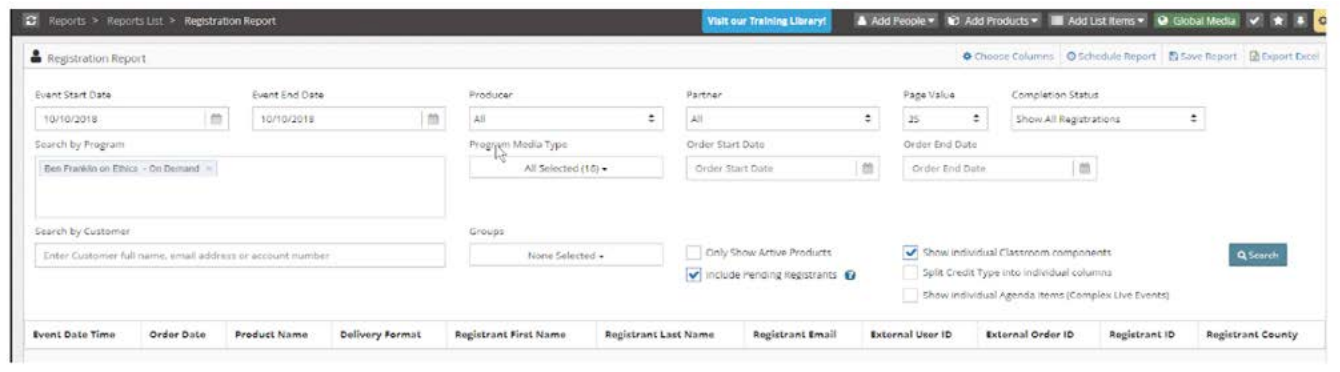


## Handy Reporting Links

Within Manager, in a product's Information tab, where you find the Current Registrants list, there are now two useful links to the Completion Report and the Registration Report. When you click the buttons, you will be transported to the corresponding report with that program already prefilled in the search filter. Just double-check the dates, make sure you've got the right columns, and hit search, and you can get a much more complete report about the registrants of this program.



This feature, combined with the recent update to remember the columns you've selected on the reports from your previous search, means that gathering details about a specific program's registrants is just a couple of button clicks away!



## Checkout in as few as two steps!

Do you want to make your checkout the simplest ever? As part of our recent shopping experience updates, we've now made it so that there are NO required customer fields in the checkout process.

To use this new feature, navigate to the [Customer Settings](#) page. You will find a column called "Display at Personal Information step at Checkout." If you edit any of the fields that you have selected for that, it will remove that stage in your shopping cart.

Mandatory

### Standard Field Location

Display at Account Creation

Display at Guestbook Registration

Display on Edit Profile in My Account

Display on Edit Profile in My Account - Used in Question Sets [?](#)

[Go to Question Sets](#)

Display at Personal Information step at Checkout

Display on Backend Customer Set Up

[Save Changes](#)

If all of your fields have the above setting unchecked, your checkout process is just two easy steps: Registrant Confirmation and Payment Submission. If a shippable item is in the cart, there will also be a third step to gather the shipping information.



Why bother to change this? There are a few things to consider if you want to change your cart to be this simple:

- When a person registers (creates their account), they are already asked all the important questions you need for all accounts.
- Any required fields you have will show up in all other areas designated, as well as right before they get credit on an account, by clicking their Certificate button.
- If you have specific questions for your members, you can ask those in their membership registration process in the form of question sets.
- If you are a client who has integrated another platform with us for a Single Sign-On process, any mismatched information in our shopping cart always creates confusion. If you can remove any unnecessary data from their view here (since they can't change it in our system anyway), it leads to a less confusing experience.
- Getting your customers through the checkout process with as little bother as possible is important. Even if you don't want to remove that step entirely, consider what is truly unnecessary in that step.

Some of you won't need to make this change at all. We've taken the liberty of removing this step if you only had the three **required fields** in that area of your cart (email, first and last name) or if you only had exactly the default fields that everyone starts with when their catalog is built. We assumed that you only had that page because of our silly defaults. You can always turn that back on by following the above steps and enabling that field in that page on the cart.



## UPDATES + RELEASE NOTES

### New Features and Updates for the (23.11) 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

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##### ACCESSIBILITY

- In our viewer, users can now pause/unpause on-demand videos by using the space bar which is handy for everyone, but specifically for users of screen-readers. .

##### CATALOG APPEARANCE

- Fixed an issue with Video Replays on the calendar so it takes you to the product detail page with the proper date selected.
- To simplify the cart as much as possible, we have now removed an unnecessary step in your shopping cart. If all you had was the standard, email, name and address information, we have removed that entire step as it is captured elsewhere in the account creation or membership sign up, etc. We believe that the shorter the cart, the more likely the sale, so we encourage you to take advantage of this. You simply need to uncheck everything in your Customer Settings in the “Display at Personal Information step at Checkout.

##### HELP BUCKET

- Now, if you add a note to a Help Bucket ticket that has been resolved or closed, it will prompt you to reopen the ticket or leave it closed/resolved. We encourage you to reopen the ticket if you have more to say and need us to see it!

##### NOTIFICATIONS

- Fixed the tool that allows you to email a speaker from within their account in the manager so that it sends from the email address you enter rather than the standard email.

##### REPORTS

- More Reports now remember the columns you most recently selected: Jurisdiction Credit Report, Product Sales Summary Report, Evaluation Completion Report, Evaluation Summary Report, QuickBooks Invoices Report, QuickBooks Credit Memos Report, Accounts Receivable Report, Group Invoicing Detail Report, Group Invoicing Summary by Member Report, Live Events Report.

##### SALES

- Added the ability to edit a check number after a check has been received.

##### SUPPORT

- You can now add keywords to your Solutions so that your users can search by other words not already included in the description or title of the article.

#### LMS (Trident)

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##### PRODUCTS

- Added an audit log in the topmost information widget when editing a product.
- In Manager, on a product’s Information tab with the Current Registrants, there are now two quick links that take you directly to the Registrations and Completion reports with the program already in the search filter for you.
- We now allow for much larger SCORM files. Please note, if you’re uploading a very large SCORM file that you should only navigate away from the product edit page once the upload is finished.
- To prevent reporting and registration errors, you can no longer delete a price adjustment that has been used.

## LIVE EVENTS

- Live Events: We have updated the import template so that it is much easier to know how to fill it out with examples, requirements and options right there on the import template.

## REPORTS

- Due to the size and complexity of the Registration Report, it now includes an “Email Report” option.

## SALES

- Clarified the design surrounding Rewards points and Refunds.

## SHARING MARKETPLACE

- Updates to the Sharing Marketplace search features to make it a bit more intuitive to search for programs.

## VIEWER/PRESENTER

- Fixed the issue with polling questions not showing up when the viewer was in full screen mode.

## AMS (Lighthouse)

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### ACCOUNTS

- In Accounts > Companies there is now a clear filter button.

### DIRECTORY

- Fixed the directory to always display a matching entry for a zip code search, even if not close to its center, and resolved map display issues.

### EMAIL MARKETING

- The Email Marketing module has been moved under the Marketing navigation.

### GROUPS

- Added the ability for company admins that are not the owner of the company based memberships to renew the membership early just like the membership owner.
- When paying dues with a check, we have updated the invoice to be less confusing and more obvious that the check is still outstanding.

### SMART LISTS

- Added a new data field to Smart Lists for company based membership owners to be found easily.
- Fixed the way Smart Lists were pulling registrants of products.