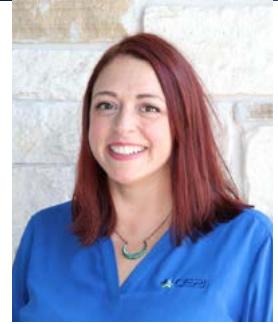


Here are your highlights for Release 23.12. Please check Page 5 for a list of ALL our new features and updates.



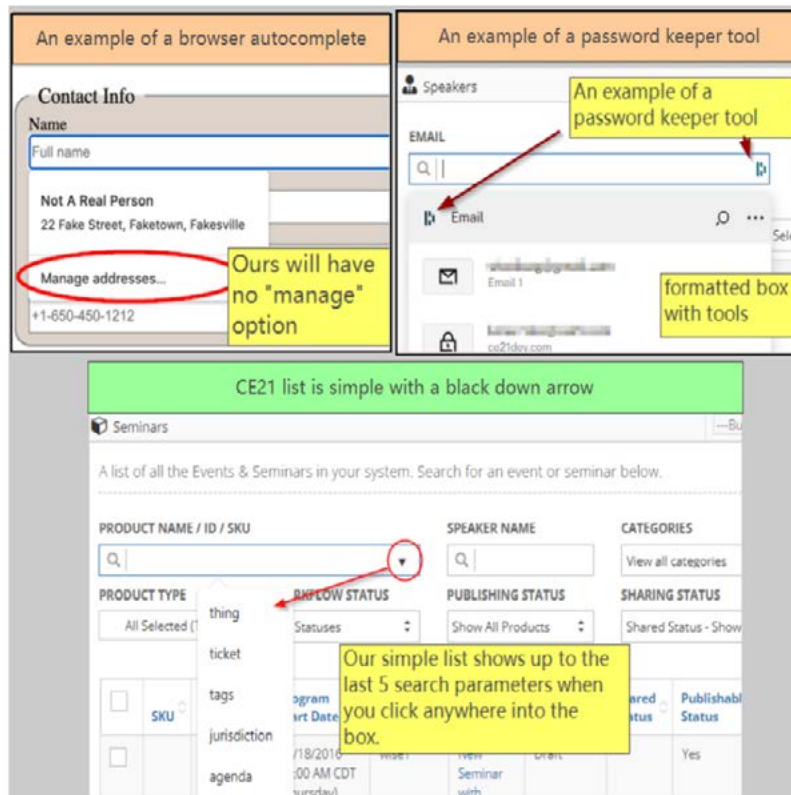
Lisa Wise
VP Product

Search updates

We have updated our search pages to clear themselves automatically when you navigate away from them so you do not accidentally mess up your search results due to previous search filters you forgot to clear out. To help, we will store the last five search terms you entered into each text area so you quickly return to a recent search. Another update is that if you go to an account, order, group, or product from the search page and then hit the back button on your browser, it would take you back to the same search, with those results showing already, eliminating the need to hit the search button again. You can find this update on the following search pages:

- Catalog > Products
- Accounts > Customer, Speaker, Company
- Sales > Orders
- Groups > Group List

Please remember that your browser or password keeper may automatically also fill in these text fields. Ours is a straightforward text box in the black dropdown arrow when you click the text field. Those password savers or browser auto-fills usually come with management or other tools. I've included some images below to compare our new feature to those other tools that you may see. We hope this makes finding everything much easier for you!



An example of a browser autocomplete

Contact Info
Name
Full name
Not A Real Person
22 Fake Street, Faketown, Fakesville
Manage addresses...
+1-650-450-1212

Ours will have no "manage" option

An example of a password keeper tool

Speakers
EMAIL
Q | |
Email
vishal@ig@gmail.com
Email 1
katie@ce21dev.com

An example of a password keeper tool
formatted box with tools

CE21 list is simple with a black down arrow

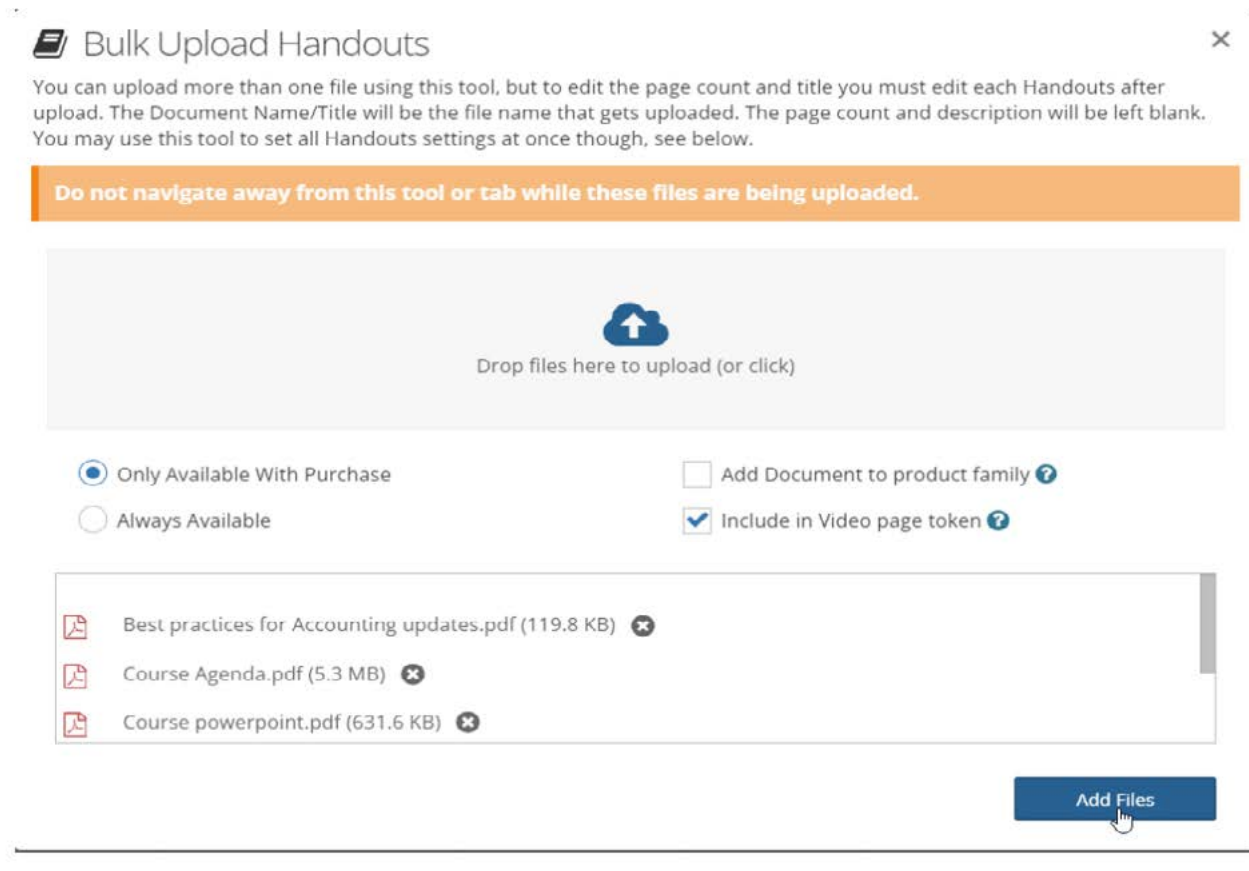
Seminars
A list of all the Events & Seminars in your system. Search for an event or seminar below.

PRODUCT NAME / ID / SKU	SPEAKER NAME	CATEGORIES
Q	Q	View all categories
PRODUCT TYPE	STATUS	SHARING STATUS
All Selected (0)	Statures	Show All Products
thing	Program Start Date	Shared Status - Show
ticket	7/18/2016 (00 AM CDT tuesday)	Shared Status - Publishable Status
tags		
jurisdiction		
agenda		

Our simple list shows up to the last 5 search parameters when you click anywhere into the box.

Upload Multiple Handouts

Using our new Bulk Add option, you can now simultaneously upload multiple handouts to your products. This new tool will allow you to select the settings as you upload the files, but you will need to edit the handout to tweak the title, page count, or description. It is best to name the file the same title you wish to give the handout, as the filename will automatically become the title.

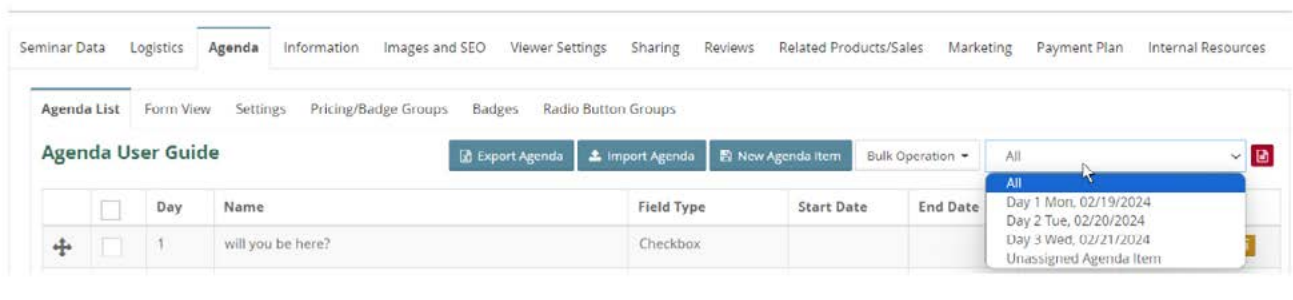


As stated in the pop-up window, it is critical not to navigate away from this tool as the files are uploaded.

Live Event Updates

Better View of the Agenda

Our first update, this round, is to show All of the agenda items in one long list.



Much like our classroom or virtual summit product type, you can now see all your agenda items on one page instead of

switching dates. You can still choose a date to review individual days and easily add agenda items to that day. If you are in the “All” view of the agenda, please select the correct date as you build the agenda item. If you forget, you can always do a bulk operation to move the agenda items to the correct date. Even if you add a day 1 item below a day 3 item, each day’s events are grouped together in the agenda viewed by the user.

Triggerable Agenda Items, Part 1

You can now trigger certain agenda items based on the responses from other agenda items. You can use this feature to provide more detailed information for registrants who have chosen to attend your after-hours mixer rather than being in front of every registrant. The applications for this are wide-ranging.

To use this new feature, first create the triggering question. That includes Checkbox, Radio Button (group), or a Drop-down agenda item for now. Then, you’ll build your triggered question or display item. This feature is available on all agenda items except Radio Buttons. Above the display settings, you will find a new option to “Display Based upon an answer in another agenda item question.” Using that list, you will choose an agenda item and the option(s) that would show this agenda item. A couple of examples follow.

The screenshot shows a form configuration interface. At the top, there is a text input field for "Name on Form" containing "Since you will be attending our after-hours mixer:". Below it is a "Font Size" dropdown set to "Small". The "Select Day" dropdown is set to "Day 1 Mon, 02/19/2024". There are "Start Time" and "End Time" input fields, each with a "Hide" checkbox and a clock icon. Below these are expandable sections for "Details" and "Handouts". The main configuration section is titled "Display based upon an answer in another Agenda item question" and has a checked checkbox. Underneath, there is a "Choose Agenda Item:" label followed by a dropdown menu set to "Would you like to attend our after-hours event?". Below the dropdown are two radio buttons: "Checked" (selected) and "Unchecked". At the bottom left, there is a "Required" checkbox, which is also checked. A yellow callout box with a pointer to the dropdown menu contains the text: "This is a checkbox agenda item. If I had chosen a dropdown or radio button group, it would show the options as a multi-select list."

The radio button trigger is a little different. To trigger from a Radio button question, you are looking for the “Radio Button Group” name in the list. For example, if I had three radio button agenda items for Class A, B, and C in a button group called “Sat AM,” rather than looking for agenda items for Class A, B, and C, I would be looking for “Sat AM” in the “Choose Agenda Item” list.

Name on Form

Font Size

+ Details

+ Handouts

Display based upon an answer in another Agenda item question

Choose Agenda Item:

Class A

Class B

Class C

Required

This is the label for the Radio Button Group that groups together the various Radio Button agenda items.

This is a list of each individual Radio Button agenda item in the above group

This triggering feature is meant to be used for items during registration. You should set the trigger and triggered agenda items to display on the registration popup. Suppose you select to show this triggered agenda item on the Customer Attendance Confirmation. In that case, it will show when users choose their agenda items, regardless of having met the trigger during registration.

We are calling this part 1 because our next phase of triggerable agenda items will be coming soon, adding two new triggers: Price Adjustment selected and number response using the Number and Number range agenda items. Another update will be the ability to import these triggers. We're making a few more updates to the agenda items, and then we'll roll out a new import template to make using all of those new features easier and more importable.



UPDATES + RELEASE NOTES

New Features and Updates for the (23.12) 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

- The Rewards tab in the user's account has been updated to clearly show the running balance of the user's rewards points .
- We now have given the option to bulk delete a list of users so long as they have never made a purchase, are not a speaker, and have not belonged to a group. This is mostly just to make it easier if you get a bot creating many fake accounts on your catalog.

E-COMMERCE

- We have updated our E-commerce settings to be broken down between the shopping cart settings and the processor settings. We have also moved Payment Plans to the Shopping Cart settings page.

FORMS

- Updated the file uploaded in Forms to include multiple formats that you select, as we have in our question sets elsewhere. The user must logged in to upload these files, and the question can accept up to 5 different files.

MANAGER

- We have updated the following Dashboard widgets to include data tables and printable graphs: Multi-Year Revenue Comparison, Sales Rev by Type - Stacked Bar Graph, Yearly Membership Comparison.
- We have made updates to the Search pages. See the **Release notes Highlights** for more details.

REPORTS

- More Reports now remember the columns you most recently selected: Sales Report with Daily Totals, Tax Report, Closed Captions Report, Sharing Marketplace Report, Discount Usage Report, Rejoined Report, Opt-In Email Report, Poll Summary Report, Polling Completion Report, Companies Report.
- When you are looking at a discount, in the usage history tab, there is now a link that will take you directly to the Discount Usage report for that specific Discount.
- Our Discount Usage Report now has an advanced 'Discount' search and selector tool, that is in line with other reports like the Registration or Sales reports.

SALES

- There is now an option for your users to edit if an order to a personal or company purchase, after the purchase is completed, on the transaction tab. This can also be edited in Manager, in the Order Details page.
- Internal Notes on refunds were accidentally removed in a recent code push. We have added those back.
- Fixed issues preventing speakers with \$0 shopping carts from registering.

LMS (Trident)

CATALOG APPEARANCE

- Fixed the issue with displaying average rating count on a few catalogs.
- Now all "Other" product media types, both physical and digital, can have colors and default images created for each one separately. Set this up in the List > Product List > Other Media Type area.

CERTIFICATES/REQUIREMENTS

- We have updated our evaluation trigger questions for Speaker based questions, allowing for specific triggered questions based on responses for each individual speaker. Requirements and options right there on the import template.
- Fixed an issue with the Document certification requirement so the Document shows as portrait and not only in landscape.
- We have removed any time limitations related to popping up quizzes within On Demand products.

LIVE EVENTS

- Live events agenda items are now triggerable from Checkbox, Dropdown and Radio button selections. See highlights for more details.

PRODUCTS

- We have updated “After Completion” Email Reminders to include a Minute option.
- Fixed issues with Product Grid. Please note, it takes a minute to load, but then you can view or search on your product detail data in any way that you like.

SHARING MARKETPLACE

- Added the Unpublish date to the Sharing Marketplace tools so you can see when the product may be unpublished, or set your own unpublish date. Also, if you’ve only got one workflow type, that will now be automatically selected for you.

VIEWER/PRESENTER

- Fixed issues with Dropbox.

AMS (Lighthouse)

NOTIFICATIONS

- Staff notifications when new members join, members need approval, and dues invoices get paid are now tracked in staff members’ manager accounts, click on your name in the upper left hand corner of manager and click Profile. The emails are listed in the System Email tab.