RELEASE 23.15

✦ CE2I
UPDATES + RELEASE NOTES

Here are your highlights for Release 23.15. Please check Page 4 for all our new features and updates.

Lisa Wise
VP Product

New Spell Check Tool Now Available!

When editing in one of our text editor boxes (CKEditor), you now have a beefy spell-checker tool available, which will automatically correct your spelling, catch major grammar issues, and allow you to add your own words to the dictionary. You can find this by clicking into the text area of the editor tool and then clicking on the little red circle in the bottom right corner.
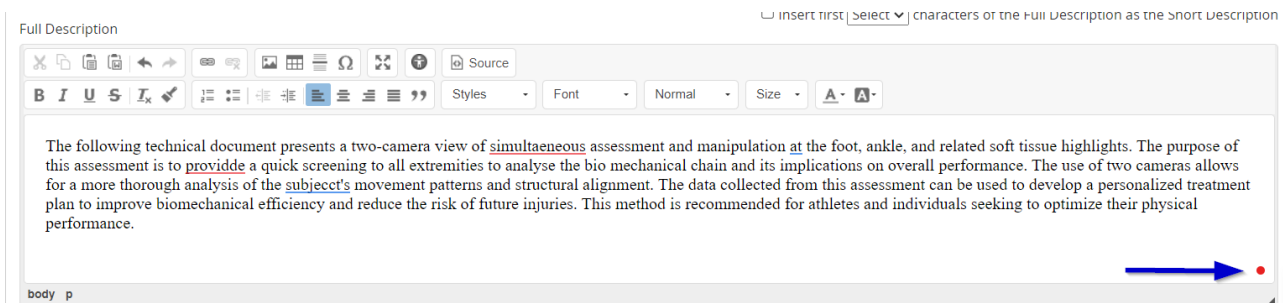
Click on the "Proofread in dialog option" to see all of the issues with your text and fix them one at a time.
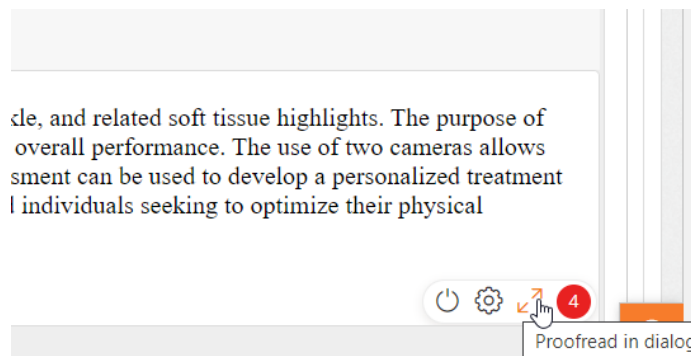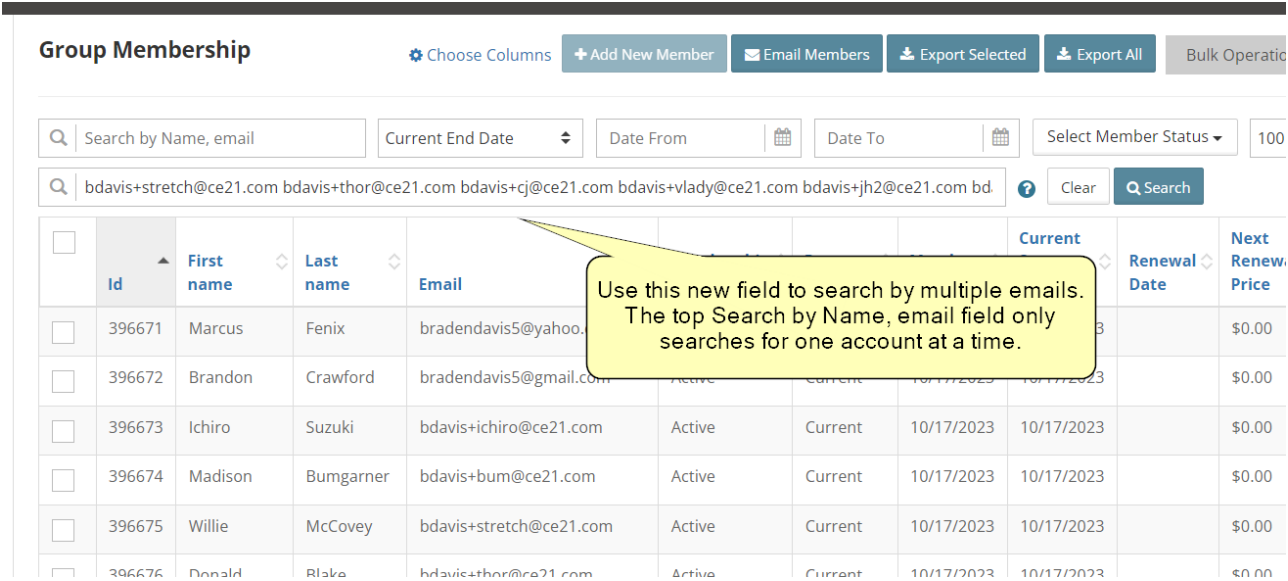

You can also click on the suggestion in the text and make changes to the text that way:
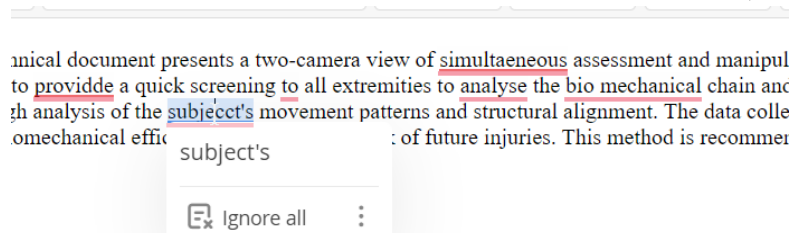
There are settings you can alter, and you can turn it off entirely. A third-party spell-check/grammar software (like Grammarly) may obscure this built-in tool of ours.

Search by multiple members at a time

Within your groups/memberships, where you can find your members, there is an option now to search for multiple members simultaneously. Simply enter a string of emails that are either space-separated or comma-separated into the new field "Search Multiple Emails," and you can find the list in question quickly. This new feature allows you to do bulk updates on many of your members all at one time, manage any of those manual groups that you have to manage, or email a group of members from that area all at once.

It will accept a list of emails that are space-separated or comma-separated so that you can copy a column in a report or Smart List and quickly paste it into this new field.

Other important membership updates are:

Status when a member has not filled out their Question Set

We have updated the functionality when a member lacks the required Question Set information. The label that was previously "Pending Requirement" is now called "Required Information Missing." This status will be highlighted in red and linked to the question set in the member's account so that your staff or the member can quickly fill in the missing information.

Group Renewal Reminders for tiered memberships

We updated the logic and added message tokens to the Group Renewal Reminders that will allow you to create renewal notifications for tiered memberships. For example, for a 1st Year membership that renews into a 2nd Year membership, you can add the tokens {NewGroupTitle}, {NewGroupDues}, and {NewGroupStartDate} with the original group tokens to let members know they will be changing membership levels and possible dues increases. This way, you will no longer have to write specific information into the template that you can only use for one group or update all those emails whenever you increase your dues.

Sharing Marketplace Update

You can now easily see when a program will no longer be available in the sharing marketplace, as the end dates are now prominently displayed on all product types. See below for an example.

COMING SOON! Classified Ads

Do you want your users to be able to sell office space, hire staff, and more from within your catalog? We are very close to being finished with our Classified Ads module. We are looking for beta testers to help us fine-tune the feature when it hits beta. Please email Braden at bdavis@ce21.com to be considered for that beta group. You can also email Braden if you'd like to be alerted once we work out all the kinks when that feature fully hits the market. Of course, there will be some pretty huge announcements when that comes out, but if you reach out now, we'll contact you personally to get you set up, trained, and started.

Enter to save $300 on your CE21 invoice!

CE21 is hosting a Technology Showcase on 11/29/23 from 11 a.m. to Noon CST. Do you know someone who would benefit from using our platform? Refer a friend and be entered to save $300 on your next CE21 Invoice! Do so by sharing this link to the CE21 Technology Showcase.

Be sure to ask your friend to make note of your organization's name in the Referral field when registering! 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, December 8th.

New Features and Updates for the (23.15) Release

If you have any questions about any of the features or functionality of this release, please submit your comment or question via the Help Bucket in the Manager, and a CE21 Team Member will be in touch.

Accounts

- Fixed issue for catalogs that do not allow customers to create an account on the CE21 catalog (SSO clients, usually). You can no longer create an account when registering for a different user on the registrant confirmation page.
- *Staff Accounts:* When the status of one of your staff accounts is changed to inactive,
  - (1) They will be removed from the Support Tickets as an Agent.
  - (2) They will be unassigned from any tickets they were assigned to.
  - (3) If the staff member was part of an escalation group, an alert will be shown to the person changing the status, asking if they would like to update the escalation path settings.

Catalog Appearance

- Fixed the layout of the Handouts table so that the table of contents is always presented orderly.
- Fixed the product image zoom and scrolling tool to make them more usable.

Certificates/Requirements

- Fixed Zoom time tracking issue if the user attended way more time than scheduled.

Companies

- Fixed an issue on the Company Portal so that the registration reports show unpublished products.

Directory

- We have moved the Directory Settings navigation page to under Groups and have relabeled it to "Directories." This is where you'll find everything related to the Directory moving forward.
- **Custom Individual Directories are here!** You can now create as many individual directories as you need. Need a "Mentor List" for younger members? Create an automated "Mentor" group of members who have opted into a Mentor program, and the younger members can easily find your experienced members. All directories will have their unique URLs so they can be posted anywhere. **Not available in the current directory plugin.** Custom Company Directories are coming soon!

Manager

- Updated all Twitter logos throughout the catalog and manager to reflect the new X logo instead.
- We have updated our Spell Checker tool in our Editor tool.

Members

- Fixed an issue allowing users to close their question set for a membership rather than answering it.

Memberships

- We have updated the functionality when a member lacks the required Question Set information. The label that was previously "Pending Requirement" is now called "Required Information Missing." This status will be highlighted in red and linked to the question set in the member's account so that your staff or the member can quickly fill in the missing information.
- Removed the Smart List (Automated) groups from the list of groups available on the Group Display Widget.

Notifications

- We added an email template to notify members that staff have requested information regarding a question set. This is triggered when a member's status is "Required Information Missing" and staff clicks the Request Information button.
- We added five new renewal notification templates to use when members or staff renew "early" or before the system automatically renews members.
- We added a staff notification to let you know a member renewed early. It triggers when a member clicks the Renew Now button to process their renewal ahead of time.
- Fixed an issue with the email scheduling tool on the Membership Payment reminders.

Products

- To clarify the values, we have fixed the column labels within the Product's Current Registrants table. Base Price is now accurately relabelled as Net Total, and Price Paid is now "Price with CE." This latter column is only important if you charge for the CE separately.
- Fixed an issue affecting the "Bulk Expiration Update" within a product with more than 200 registrants. That tool will no longer time out on those larger programs.

Reports

- Fixed the issue where Speaker columns could not be turned off on the Evaluation Completion Report.

Sales

- For any outstanding PO orders, if you cancel the program, that order will also be canceled, and the user will no longer be able to pay for that order.
- For a better user experience, we have updated the Reward Points feature to operate based on a one-time threshold minimum rather than an order minimum.

Smart Lists

- Fixed issues with Smart Lists and product registrants.

Website

- Fixed WordPress Plugin calendar widget issue.

Additional:

- *In case you missed it:* Watch the on-demand version of our recent User Conference, where we covered Highlights and Newly Released Features, Sharing Marketplace Overview and Updates, White Glove Course Creation, Website Maintenance, API Integration, and In-depth AMAs on all things LMS, AMS, and Event Services. Register (free) for **2023 Compass: Chart Your Course**!

IMPORTANT UPDATE

We have moved!! We have updated the address in the footer in the Manager to reflect our NEW Address:
5900 Southwest Parkway #401 Austin TX 78735