

RELEASE
24.1



UPDATES + RELEASE NOTES

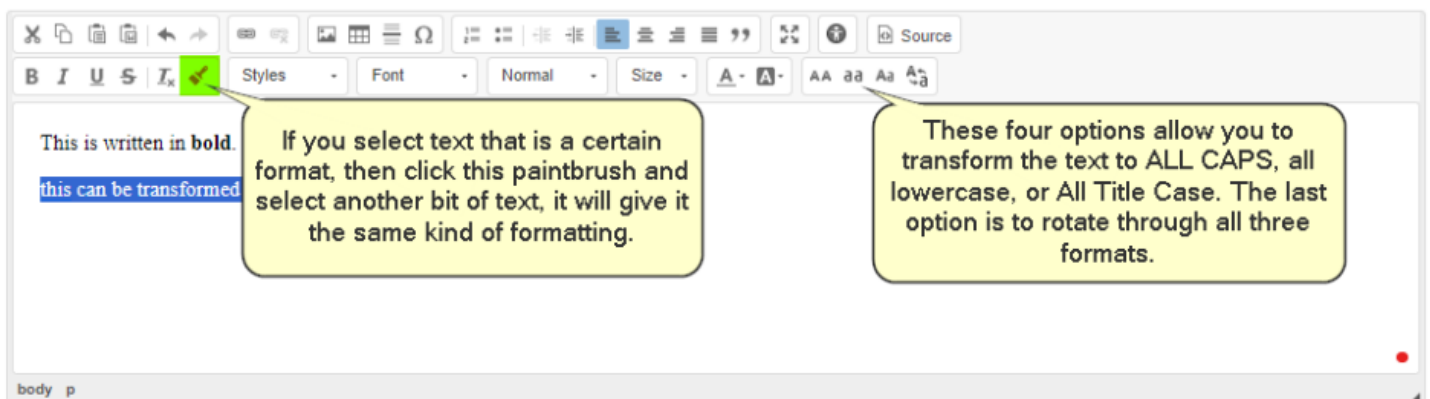
Here are your highlights for Release 24.1. Please check Page x for all our new features and updates.



Lisa Wise
VP Product

Another CKEditor Update

We have added some new features to our CKEditor tool, our rich text editor. You can now copy and paste formatting from another section using the Paintbrush tool. Additionally, you can easily change the case of your text to Title Case, ALL CAPS, or all lowercase by using the three text transform buttons below.



Net Promoter Score in Evals, Forms, & Quizzes

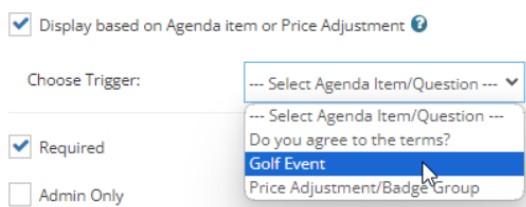
We have recently added a new question type to our Evaluations, Forms, and Quizzes - [Net Promoter Score](#). This metric uses a rating scale of 0 to 10. However, please note that the Evaluation Summary Report does not use the specific Net Promoter formula to get the values. Instead, it shows an average value like all other questions. If you need to calculate the Net Promoter Score, you can download the Evaluation Completion Report and calculate it using individual values. To help you with this, here is [a link](#) showing how that formula works.

New Ways to Trigger Live Event Registration Pop-ups

We have two new exciting ways to trigger an Agenda question pop-up on the Live Event Registration pop-up form. These updates expand on our recent updates, which allow you to trigger specific questions based on the users' answers to Checkbox, Dropdown, or Radio Button Questions. See [the 23.12 release notes](#) for a review.

Based on a Number Question

This feature allows you to add one or multiple fields based on the number entered by the user in response to a "Number" question. For instance, if you sell tickets to an onsite event (like an "After-Hours Golf Tournament" that costs \$25 per ticket) using the "Number" question type, you can use this feature to charge an additional amount per extra ticket purchased. To use this feature, add your question, scroll down to the agenda item settings, and find the "Display based on Agenda item or Price Adjustment" setting. Check the checkbox, and you'll get a list of triggerable agenda items and price adjustments. Choose the Golf Event.



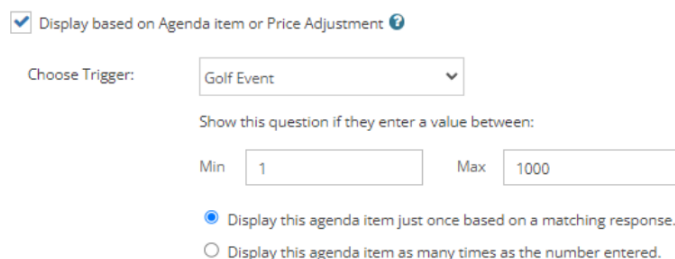
Display based on Agenda item or Price Adjustment ⓘ

Choose Trigger: --- Select Agenda Item/Question ---

Required

Admin Only

When you choose an option in the agenda, you can select to display it only once or as many times as the number entered. If you need to ask for information from every guest and want it to show up separately, choose the second option. Select the first option if you only need to ask for information once and don't need it to appear multiple times. Set the minimum to 1; you likely won't need to ask more questions if the answer is 0.



Display based on Agenda item or Price Adjustment ⓘ

Choose Trigger: Golf Event

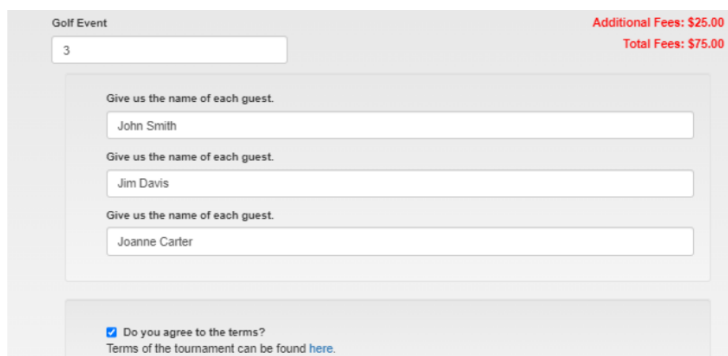
Show this question if they enter a value between:

Min Max

Display this agenda item just once based on a matching response.

Display this agenda item as many times as the number entered.

On the registration pop-up, it will appear as such:



Golf Event Additional Fees: \$25.00
Total Fees: \$75.00

Give us the name of each guest.

Give us the name of each guest.

Give us the name of each guest.

Do you agree to the terms?
Terms of the tournament can be found [here](#).

Based on a Price Adjustment

Often, you have asked to be able to trigger an agenda item based on a person's membership. This update will solve that since you can limit your price adjustments to memberships! One of the trigger options is now Price Adjustment/Badge Group. When you choose that, you will see

a list of the different price adjustments available, allowing you to select anyone who should know this agenda item in their registration pop-up. Please note that this will not work with the base price. You must set up a price adjustment to get this trigger option.

Display based on Agenda item or Price Adjustment [?](#)

Choose Trigger:

Choose option(s):

- Member Price
- Non Member price
- Pro Member Price

This is a reminder that, like the other agenda item triggers, **these updates do not alter how credit works**. You cannot prevent access to agenda-level credit using these features, which should be used primarily on registration-focused questions.

New Buttons/Messages to Edit in Groups

Getting members registered into your child groups or reviewing/editing their Question set can be confusing, and each association differs. Staff can now update the message and buttons for both of those actions. To edit these, go to Group > Group List > Choose your group, then go to Settings > Button Labels. Scroll down to find the new options for Child Group Button Label, and Question Set Button Label.

The screenshot shows a membership page for a 'Professional' member. On the left, there is a list of membership details: Name, Status (Active), Payment Status (Current), Billing Cycle (Monthly), Current Start Date (Apr 06, 2023), Current End Date (Apr 05, 2024), and Next Renewal Due (Apr 06, 2024). On the right, there are several buttons: 'Invoices & Payments', 'Resources', 'Relabeled Membership Cert', '+ Renewal History', 'Membership Information', and 'Additional Memberships'. A yellow callout points to the 'Membership Information' button, stating 'This is the Question Set button, relabeled'. Another yellow callout points to the 'Additional Memberships' button, stating 'You can now relabel the button and the text for the Child group access'. A green callout points to the 'Additional Memberships' button, stating 'This membership includes access to additional memberships. Click the button below to view.'

New Email for Products: Balance Due!

We have introduced a new email reminder called "Registration Reminder: Balance Due" that you can edit and utilize as an event reminder. You can use this email to remind users of any PO, Pending Check, and Pay Later orders that have yet to be paid in full. You can either attach this email to a program as a new event reminder or manually send it to users who still owe you money. To find the list of users who have not paid in full, go to the Registrant list within the product and check the "Payment Status" column. If used as an event reminder, we will only email users who are pending payment at the scheduled date. Remember to save a version of the email template before it appears in your event reminder tools within the list of useable email templates.

Please note: The Order List is still being worked on so that we can show the user a current view of their outstanding balance due. We are working to match the order list in the order confirmation email. We hope to have that out in our next release. If you would like to go ahead and set those emails up, when we fix the order list, it will be automatically corrected on your email templates as well. We also link them to their account in the Transaction tab, where users can pay their remaining balance.



New Features and Updates for the (24.1) 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

- **If you manage multiple tenants**, you can now choose to only display speakers from the Manager menu> Global search. This way, you can easily find that speaker's unique (non-distributed version) when editing their bios, images, and other details. You will also see a speaker count column that displays all the currently published programs, making it easier to keep track of your speakers. We have also added more columns that are particularly helpful when reviewing your speakers, such as company, title, credentials, and more.
- Modules within both Virtual Summits (VS) and Classroom products will align their expiration dates with the overarching expiration date of the respective VS or Classroom. This means that individual modules will no longer have separate expiration dates but will now share the same expiration date as the overall product. This adjustment aims to streamline and avoid confusion, ensuring that access to these modules concludes simultaneously with the expiration of the entire product.

- We added more audit log tracking for speaker and customer accounts, such as when a staff updates notification settings and custom fields on the user.

Catalog Appearance

- Our CKEditor tool has been updated to include a text transform feature and a style copy paintbrush. See our highlights for more information.

Companies

- We have improved the Company settings to make certain features more straightforward. We advise you not to use the "Catalog Setting: Use Enhanced Company Search/List" until the next release. Stay tuned for new features coming soon!

Lists

- You can now use the 0-10 net promoter score type question in Evaluations, Forms, or Quizzes. See our highlights for more information.
- Forms using customer fields must now require a user account to ensure the correct form population.
- The hints in quizzes will now allow for rich text. You can edit how they show within the quiz options.

Live Events

- You can now prompt specific agenda items to appear in the registration pop-up based on price adjustments or if a "Number" question is included. This is similar to our recent release, where checkbox, dropdown, and radio button questions were added as trigger items. See our highlights for more information.
- You can now go back and forth in an agenda to quickly review all your agenda items without constantly opening and closing pop-ups.

Marketing

- Fixed a variety of defects.
 - For bundle 3, unpublished products will be removed from the bundle sales page.
 - For bundle 5, we have fixed an issue that previously prevented a product from being added to the bundle due to related products.
 - If you charge separately for your CE, it works well with bundles 1-4. We are still working to resolve the issues required to make it work with bundle type 5 ("build your own bundle").
 - For all bundle types, you can now see the current publication status of a bundle in the manager's product list.
 - Additionally, we have resolved the problem of adding products to the bundle from the product details page.

Memberships

- Staff members can now customize button labels for "Question Set" and "Child Group" within the user's membership tabs on the catalog. See our highlights for more information.
- Membership question sets will now display the date they were last filled out or edited.

Products

- A new email reminder titled "Registration Reminder: Balance Due" can be used to remind your users who have not completed payment for a program. This reminder will be sent to all purchases made on PO, Pending Check, and Pay Later orders. You must edit the template first to use this reminder for your products. Once edited, it will appear in your list of available emails before and after showtime and after purchase. See our highlights for more information.
- Improved expiration settings are now available for Virtual Summit products. You can set the expiration based on either the purchase or event date. Adjust the settings within the product to manage your products better.
 - For Classroom products, the expiration is based on the purchase date if no event date is specified. If you set up your Classroom products as "Virtual Conferences" and provide an event date, the expiration then becomes based on the date of the product.

Sales

- If a user has a pending order (such as a pending check, PO, or pay later option) and is not allowed to register for the same program more than once, we will prevent them from making a second purchase.

Sharing Marketplace

- You will now see badge counts when searching for programs to share in the Sharing Marketplace. These counts will show the number of programs in a specific category or product type. This will save you time by helping you identify the number of programs available before you click on them. Additionally, you can use this feature to find gaps in the recorded programs available.
- You can now access your sharing marketplace tab more easily by clicking the button next to your publish features. This will allow you to quickly access your sharing marketplace tools when publishing your programs, making it more convenient to share your program with others.

Smart Lists

- We have added all standard Customer fields to the choose columns tool for smart lists.
-