

RELEASE
24.02



UPDATES + RELEASE NOTES

Here are your highlights for Release 24.02. Please check Page 4 for all our new features and updates.



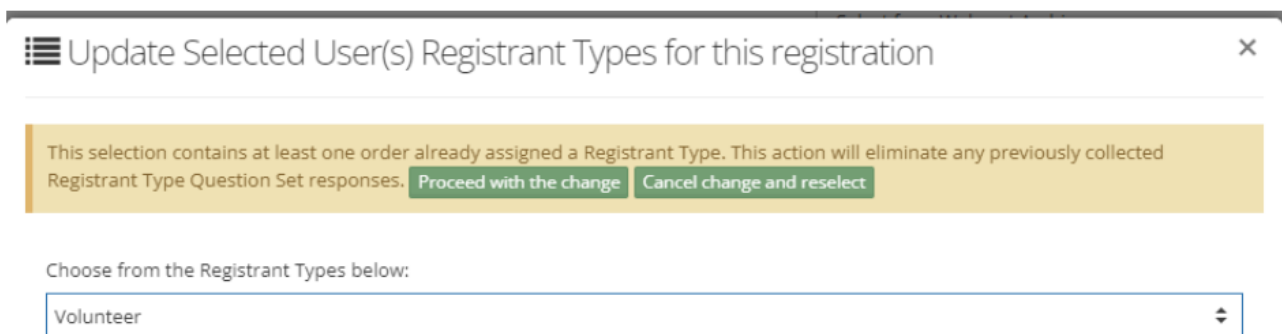
Lisa Wise
VP Product

Update a User's Registrant Type on a Product

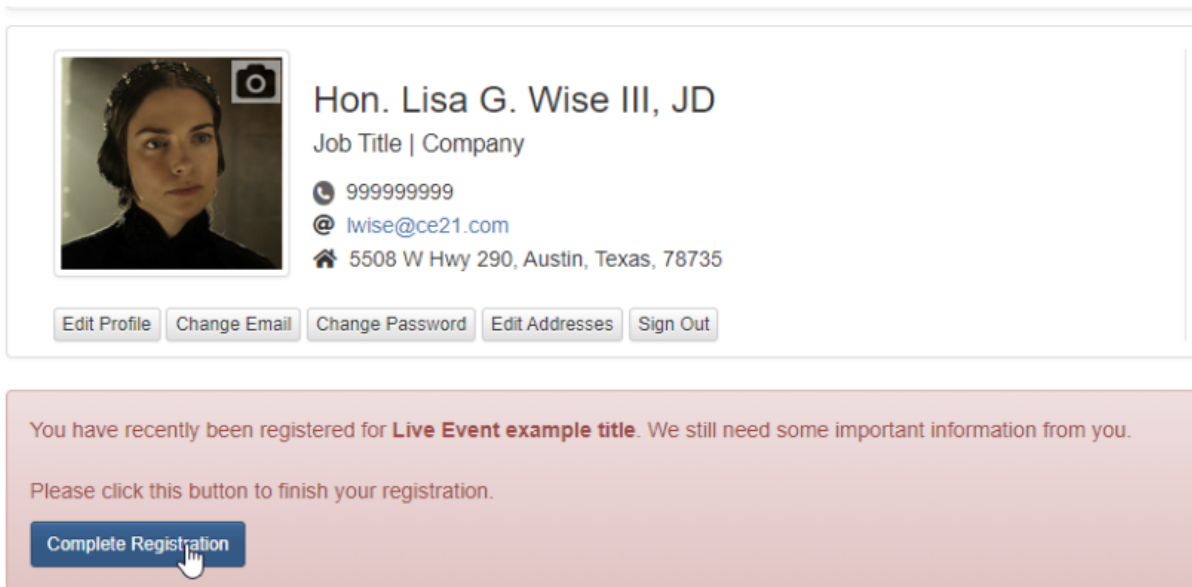
In the Information tab of a product, you can now add or modify the Registrant Type for any registered user on the Current Registrants table. It appears at the bottom of the Bulk Operations dropdown list.



If the user already has a Registrant Type, you will receive a warning message because any changes made will delete the previously collected information. If you want to proceed with the action anyway, you can ignore this and choose from all the Registrant Types you have set up for your products.



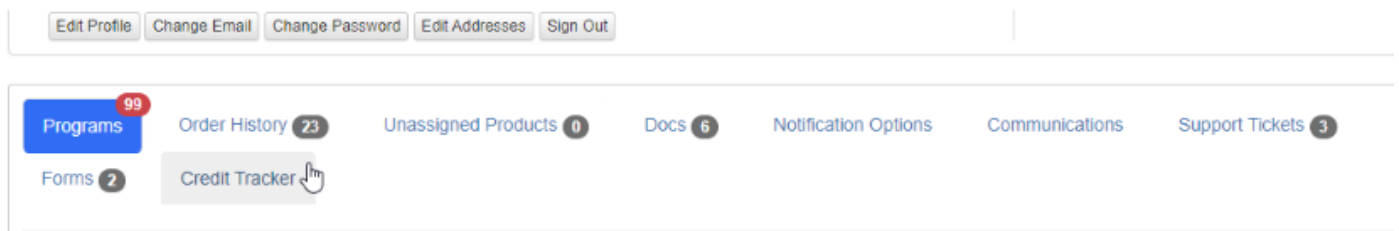
The form will appear in a pop-up window if the Registrant Type you select includes a set of questions. You have three options: you can answer the questions yourself (which will give everyone the same answers), bypass the questions entirely, or request the user to complete the questions within their account. If you choose the last option, an email will be sent to the user, and they will receive an alert to fill in their form whenever they log into their account.



Why is this feature important? First, you can use this tool to reset a person's form if they filled it out incorrectly. You can use this new feature if you've updated your form or need to fix several users simultaneously. Email reminders on events can also be sent only to certain Registrant Types. You can now set up certain emails to go to speakers, volunteer leads, or other user groups you may not have known at the time of registration.

User Account Navigation Update

We have recently replaced the tabs in the user's account page with pills to improve user experience. This change resulted in a drastic reduction of tech support calls when we updated on Classrooms. The new design is visually appealing, especially when two rows of tabs exist. Additionally, it has helped clean up spacing issues affecting some catalogs.



As a friendly reminder, you can rearrange the [Custom Labels Settings page](#) tabs under the My Account tab. This feature can be helpful if you have membership information you want to prioritize or prefer to highlight the Credit Tracker over the Support Tickets tab. Remember to try it out!

Important New Email Message Tokens

We released two new essential and handy message tokens in this sprint. The first is the **{AgendaFormwAnswers}** message token, used with Live Events to show users everything they saw upon registration and answers to any questions.

Please note, for Radio Button questions, rather than showing the question, it displays the Button Label (the thing that groups the radio button options). We advise those who use this token to describe those Button Labels in a way that would make sense when shown later in the email, such as "Selection for Saturday AM: Session 1" instead of 1a. This message token will also include location information and details you add, so long as you set those details to be always displayed (not using the expander).

Agenda Registration values example:

Date: 7BADGE

Your answer: 01/29/2024

Time: 8BADGE

Your answer: 05:15 PM

Number Range: 9BADGE

Your answer: 0.00

Another vital message token is the new **{RegistrantQFormwAnswers}**. Like the Agenda-based option above, you can add this message token to emails to show the user their answers for any Registrant Question sets that pop up when they register. It will display all questions and answers on the form, even if left blank.

Example Registrant Question Set value:

Registrant(s):  (id: ) (phone: )
Your registration answers are:

1. from which State?

Your answer: Alabama

2. Birth Date

Your answer: 01/22/2024

3. yes no?

Your answer: yes

For both of the above message tokens, it will only show those questions that were triggered with their prior selections or badges. Also, if the user still needs to fill in that information, it will link them to their account, where they can complete their registration.

You can find both message tokens on the following email templates:

- Order Confirmation
- All of the Event Reminders 1-16
- User Registration - Finish Registration Form
- Live Event Confirmation Additional Steps
- Registration Reminder: Balance Due

Speaking of the Registration Reminder: Balance Due email, we have now fixed that **{OrderList}** message token to show the current balance information of the order at the time of email delivery. This is a wonderful reminder to add to your events to remind those unpaid registrants that the event they owe for is coming up!



New Features and Updates for the (24.02) 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

- You can now update the Registrant Type after registration from the Information tab on the product's list of registrants. *Refer to the detailed instructions above.*
- To clean up and clarify the tabs within your user's accounts, we have changed them from tabs to pills. *Refer to the detailed instructions above.*

Companies

- We have updated the invoice due alerts for Company Based Membership. The alert is now consistent between company admins and the membership owner. Employees see the alert and can notify their admins.
- We have made it easier for company admins to pay for an employee purchase if that order is already in another admin's cart.

Directory

- Fixed an issue where directory pages weren't appearing correctly for the member when reviewing their directory page.

Email Marketing

- When resubscribing a user to a previously unsubscribed category, a reason for the change must now be provided and will be saved to the user's account.

Live Events

- Fixed reporting for number-triggered questions so that all answers are showing on reports and in the order they were answered.
- We have resolved an issue where you could not show all agenda items for all days and reorder them without first selecting a specific day.
- For Live Events with registration forms, when your staff registers for those programs, you will now be asked to complete the registration form.
- We have removed the default settings on agenda items to speed up agenda setup.
- For Live Events you've attached to another product as an "Add-On," the agenda registration form will now be displayed so users can fill it out before adding both items to the cart.

Memberships

- Fixed an issue where members received conflicting messages about invoice payments in their accounts and how to pay them.

Notifications

- We have added a new message token to the following email templates: Order Confirmation, All Event Reminders, User Registration - Finish Registration Form, Live Event Confirmation additional steps, and Registration Reminder: Balance Due. This message token is {AgendaFormwAnswers} and will show the Agenda items the user saw at registration and their answers when inserted into the email template. *Refer to the detailed instructions above.*
- We have added a new message token to the following email templates: Order Confirmation, All Event Reminders, User Registration - Finish Registration Form, Live Event Confirmation additional steps, and Registration Reminder: Balance Due. This message token is {RegistrantQSFormwAnswers} and will show the Registrant Type Questions the user saw at registration, along with their answers when inserted into the email template. *Refer to the detailed instructions above.*
- Our new Registration Reminder: Balance Due email template now includes a detailed order list table, similar to the one on the order confirmation emails.
- Fixed the way split payments show on the Order Confirmation payment method.

Products

- Fixed an issue where the calendar wasn't showing quotation marks correctly.
- Fixed an issue with Guestbook registration for Virtual Summits/Classrooms when using the "Disable launch until (date)" setting. Users will now see that they cannot access the program until the specified date.
- When setting up webcasts, virtual conferences, or virtual summits, adding each date individually is important instead of creating a single date range that spans multiple days. By doing this, your users will clearly understand each event day's start and end times, and it will be clearer in your catalog. If you still prefer to create it as one long event span, we'll now warn you that it may need to be clarified to the users, but you can still proceed with your preference.

Reports

- For the following reports - Company Based Membership Report, Group Members Report, Accounts Receivable, Rejoin Report, GL Totals Summary - all Price columns are now displayed as currency, allowing for easier totaling and calculation.
- Some users were kicked out of the Emailed Reports area in Manager when emailing a large report to themselves. This issue is now fixed.
- We have fixed an issue where the Accounts report wasn't displaying correct results for the Accept Checkbox Custom field.

Sales

- We have updated our gift cards to include the ability to limit usage within specific tags and/or categories.
- To align ACH with Check orders, we will allow you to grant your users access to their products (not their certificates) before the ACH payment is finalized. You can update this setting in the Ecommerce Settings > Shopping Cart Settings.
- If you have a setting that prevents users from purchasing a different product in the same product family, then any pending orders such as purchase orders, pay later orders, or pending check purchases will also be prevented from purchasing that product within the same product family.