Here are your highlights for Release 24.03. Please check Page 6 for all our new features and updates.

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VP Product

Email Marketing Tool Updates

This sprint saw the release of several highly requested features for the Email Marketing tool. Let's take you through them one tab at a time.

Resend Campaign Options

Are you looking for a way to resend a campaign to users who didn't open it the first time? Or do you want to send reminders to the same group of subscribers by adding a new date to the same campaign? We've got you covered with the Resend Campaign Option, which allows you to resend a campaign multiple times easily. Simply select the resend audience and add dates. Your audience options are: Didn't Open, Didn't Click, Original Audience (sends the campaign to the full original audience), and Current Audience (includes any updated members added or removed from the smart list).

To resend your campaign, in Step 2, you can select "Resend Campaign".

When you select that, the new features will open, allowing you to choose the audience and set as many dates as you need.

Better Preview

At the bottom of Step 3: Email Content tab, there is now a "Save and Preview" button. This button will open the email in a pop-up to give you an idea of its layout so you can make changes quickly while you're still on the Email Content page.
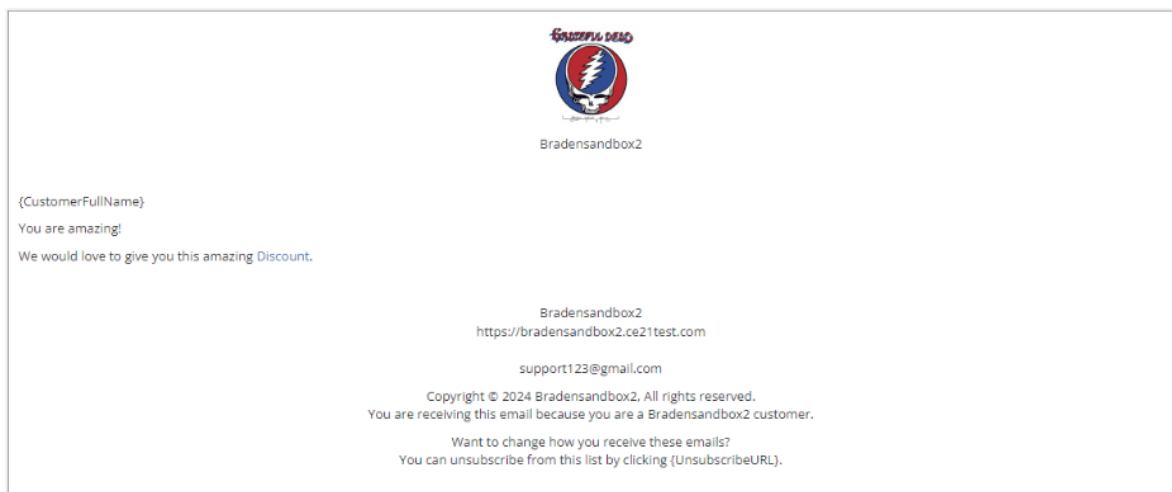
Preview Email Campaign Updates

This tab has received a significant update that provides all the essential details about the campaign in one place.

You can review the email one last time before sending it. Additionally, there are two new buttons at the bottom - one to Send Now, which will bypass the scheduled date and send it now, and another to Send Test Email to see how it will appear in a recipient's inbox.

Report Updates

When you review the report after sending your campaign, you will see the Send Date on that page now. Additionally, if you have chosen to resend the campaign, the report will include all the dates on which it was resent, along with the details of the audience to which it was resent.
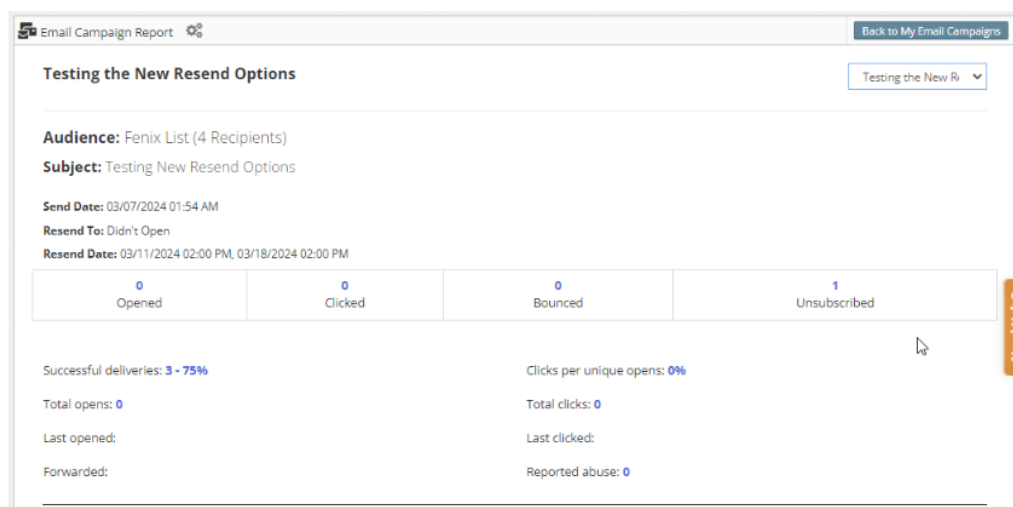
What's next on the Email Marketing horizon? Better template options, hopefully with a template builder!

Better Multi-Viewing Prevention

When a user watches a video on CE21, they are typically unable to launch a second video because the new viewer will overtake the same tab as the previous viewer. Some users found ways to get around this and launch multiple viewers to get credit from multiple courses simultaneously. We have prevented this by tracking any viewer launch from a person's account. This will prevent them from accessing via different browsers and tabs, if they are on different devices, etc. If we see that their account is engaged

in another video, we will show them this message on the new viewer that is opened, and the video will be paused until they decide. If they choose this new viewer, the other video will pause, showing this message instead. This viewer will close if they choose to Return to the Original Program.
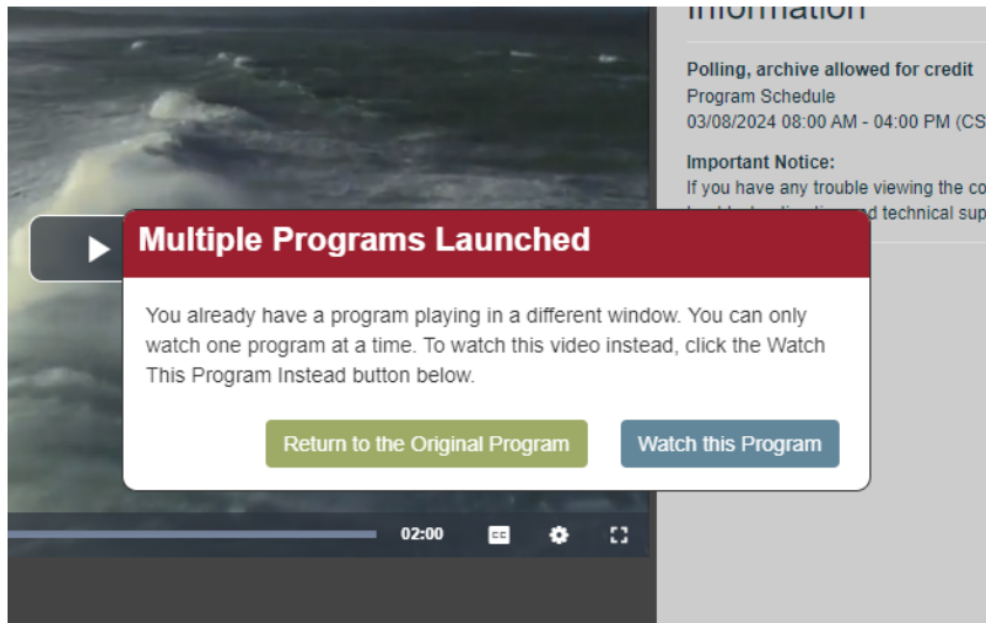
If you impersonate the user, you will not interfere with their viewer interaction or receive this message as it is not tracked as actual participation.

New Tools for Child Groups

We recognize that every Child Group, known as Chapters, Committees, and Sections in our system, has distinct characteristics that may differ from membership to membership. To assist you in clarifying to your members how your sub-groups operate, we have introduced some new tools and updates that enable them to manage, join, and leave these groups more efficiently.

Customize the verbiage for Child Group access

Your members will see the information about their child group from within the parent group on their account in the catalog.


You can now edit:

1. The Question Set button label
2. The short description for your sub-group so your users have a better understanding of your process.
3. The Sub Group button label.

To edit these items, navigate to the Settings tab of the Parent group. From there, go to the Button Labels tab to find the options for relabeling.

Tools for Child Group Management

This new sprint changes how members can join and manage their access to eligible Child Groups. When they click the Child Group button, they will be redirected to a page where they can view all the subgroups available based on their membership in the parent group. They can join multiple groups at once by checking the boxes and saving the changes. Also, they can cancel their memberships here according to the settings set in the parent group.

Renew or Repost a Classified Ad with Ease

Users posting Classified Ads on your site can now easily repost or renew their ads with just one button in their Classified Ads table. If users want to extend the time to display their ad on your site, they can simply click the "Renew" button. On the other hand, if a user has marked their ad as "Sold or Completed," they will see a "Repost" button instead of a "Renew" button. Clicking on either button will load the fee plan into their cart so they can pay for it again. If the user doesn't change the original ad

you have already approved, we will post it immediately. However, if they make any changes, you will receive a notification to approve the ad as usual.

Once they have renewed or reposted, the original line is removed, and the ad shows at the top of the list with the most recent renewal/repost date, allowing them to track the same ad in one row. The poster can show or hide the ad history by clicking the "Show History" button.

New Features and Updates for the (24.03) 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

- Donations will stop for deleted accounts, but the donation details will remain in the Manager and reports.
- Fixed a minor issue with our political districting tool.
- We have updated the viewer to prevent users from opening the viewer simultaneously in multiple browsers, different machines, or new tabs. *Refer to the detailed instructions above*.

Catalog Appearance

- Fixed search issue in the catalog for an "Other" Digital product type.

Certificates/Requirements

- Fixed quiz issues on SCORM courses that use CE21 quizzes and their SCORM.

Classifieds

- An audit log tool was added to the fee plan to track who made changes to the plan and when.
- Fee plans are now included in all QuickBooks-based reports.
- Fixed the "From" email for the Contact Seller/Employer contact form. That will now be populated with the from email you have set up in Notification > Email Templates.
- Fixed the display of Classified Ads in the Purchases list in the user's account in Manager.
- Fixed the text limitation that appeared for ads created in Manager by staff.
- Fixed the wrapping issue in the Classified Ads display.
- Users can now easily Repost or Renew their Classified ad with just one click. *Refer to the detailed instructions above*.
- The Classified Ads search page has been cleaned up. More to come in the 24.04 release.
- We have updated the classified ad form to provide more space for ad details.
- You can now share the permalink for a specific fee plan, taking the recipient directly to a page where only that fee plan is available for purchase.

Email Marketing

- We are pleased to announce that our email marketing tool has been updated with some exciting new features. You can now send emails instantly, and the previewing feature has been enhanced to include more details about your campaign, giving you a better idea of how the email will look before it is sent. We have also added a Send Test Email tool to help you ensure that your email is perfect before sending it to your subscribers. Lastly, we have included an option to resend emails to all subscribers or only those who have opened the email or clicked on a link. *Refer to the detailed instructions above*.

Imports

- You can now import the members' "Member Since" date using our Groups > Import Members template.

Lists

- You can now use Company Standard and Custom fields when creating a Form. (see Lists > Forms)
- Fixed the CKEditor in the Registrant Type Question Set. Now, you can ask questions, allowing users to answer in rich text while registering.

Live Events

- Fixed issue with the Live Events badge templates so that it uses standard US-sized paper, instead of A4 as the default.
- Live Events with Agenda Item-Based credit now allow partial credit issuance for attended events via Customer Attendance Confirmation.
- To help you identify which agenda item you are editing, the agenda item will now be highlighted in the table when you move back and forth.

Manager

- To accommodate our longer breadcrumbs in the header and smaller monitors, we have decided to shrink the "Add People," "Add Products," and "Add List Items" buttons to show as icons.

Membership

- We have taken action to address the issue of some members experiencing double charges. Please let us know if it persists.
- You can now relabel the Question Set button in the Group's Settings > Button Labels tab.
- We have changed how we show Child Groups in the catalog for your members and how your users can join the child groups. These changes are designed to make it easier for your users to understand and use the process. *Refer to the detailed instructions above.*
- When your member wants to start paying for their membership with ACH instead of a Credit card or vice versa, we have now streamlined that to be one process instead of canceling and re-establishing the payment.
- Fixed the issue where members who paid their invoices ahead of their payment date were still getting payment reminders on the invoice date.

Notifications

- You can now access email reminder templates via a link on the information tab of the product where the email is located.
- All pending payment orders (Pending check, PO, Pay Later, and Pending ACH) will now receive any event reminders before/after showtime, at archive, after purchase, before/after expiration, and before/after credit expiration.

Products

- When swapping a person into a new product, the expiration date follows the rule of the new product now, not the initial one.
- If you distribute video replays to a subtenant, you can now add a date in that subtenant directly rather than having to add it at the producer and distribute it downstream.
- If you set up a classroom with a video replay where the user can choose the date they would like to attend, you can now delete some of those dates using a new bulk tool. You can also delete the video replay if you added it in error.

Reports

- Fixed the issue preventing donation refunds from showing on the product sales report.

Sales

- Regarding the check payment form, a user prints out to send their payment, we have updated the site message for both personal and company checks to be fully editable using the site message in Catalog Settings. Everything in the message above the order form table can now be edited.
- When swapping a user's product for a more expensive one, you can now choose the Pay Later option to allow the user to pay the price difference from their account.
- We have updated the "Pending" orders to clarify their status in order details. Additionally, we have removed some features causing issues and added a cancellation option so that you can now remove the pending order entirely if needed. Please note that "Pending" orders are temporary orders initiated by staff within the Manager and are not visible to users.