

Here are your highlights for Release 24.05. Please check Page 5 for all our new features and updates.



Lisa Wise VP Product

Sign In Process Change

For our clients who use the "Standard Sign In" process (see your <u>Catalog Login Settings</u>) and do not use the "Redirect Login Page" feature, we have made a significant improvement. Now, when your users log into the catalog, they will be seamlessly redirected back to the page they were on. This means that customers can easily access the pricing available only to members by logging in and browsing the bundle page, search page, or product page they were viewing. This streamlined process simplifies selecting the appropriate pricing and enhances their overall user experience.

We will explore adding this to our Remote Authentication options in a future release.

Emailing Tool in the Member table found in the Group

When editing a product, a handy email registrants tool is available in the list of registrants. We have added a similar feature to the membership table of members that you find within the group.

4+ Years of Practice						View Group	+ Add Member Grou
General Appearance Landing Pag	e Membership Se	ettings Products	Library Calendar	Members Member Up	oloads Group Cha	ts Child Group	p(s)
Group Membership							
Group Membership	+ Add New Member	Email Members	Lxport Question Set Dat	a 🛓 Export Selected	▲ Export All 8	ulk Operations	¥
	+ Add New Member				▲ Export All B Select Member Stat		•

You can email selected users or those who meet status criteria at the time of the email delivery.

Send Member Email	>
Send to:	
Email Selected	\$
Email Selected	
Required Information Missing	
Pending Approval	
Active	
Lapsed	
Pending Payment	
Suspended	
Member Cancelled	
Invitation Sent	
User Requested Membership	
Membership Ended	
User Rejected	
Dropped	

You can choose who to send the email from and either select from any "Group Member" recipientbased template or choose no template and email on the fly instead. Membership and user message tokens are available for use.

From:		
 Global (noreply@ce21.com) 	Template Override (Not Set)	
Lisa Wise (lwise@ce21.com)	O other email	
Load Email Template:		
Successful Renewal Notification	:	÷
Subject:		
Certification Renewal Successful		
Message tokens:		
{CustomerFirstName} {CustomerLastName} {CustomerFullNan	ne) {GroupTitle} {CurrentStartDate} {CurrentEndDate} {RenewalDate}	

It will send the email immediately or on a schedule. The scheduled emails will only be sent to users who meet the status requirements at the time of delivery.

Thank you,			
{TenantName}			
Send copy to:			
Send copy to			
BCC:			
Send bcc to			
Do not use global header	Do not use global footer		
Attach a file:			
Choose Files No file chosen			
Send this email now, or schedule for later:			
○ Send Email Now			
Schedule for later		L13'	
05/08/2024 02:30 PM			
			Schedule Email

This update also includes a new Communications tab to review the emails sent using this new tool. You can find both the emails you sent and those you scheduled. If you have chosen a status instead of a specific number of members, we can only show the number of recipients once the email is sent, as those statuses may change. When the email is sent, or if we know the specific users you're sending the email to, you will find that in the number of recipients columns.

ild Group	p(s) Communica	ations					
		e emails se	ent and scheduled using the Email M	embers fea	iture on the Members	tab.	
	Date		Subject	Staff	Туре	# of Recipients	Tools
	+ 05/07/2024 02:24 PM (CDT)		Group - Pending or Missed Group Renewal	Lisa Wise	Email: Selected Emails	37	☑ View Email
chedu	uled Emails						
Schee	dule Date	Subject		Staff	Туре	# of Selected Members	Tools
	05/21/2024 03:00 PM (CDT)		fembership Approved or Payment d	Lisa Wise	Email: Pending Payment	N/A	🖸 View Email

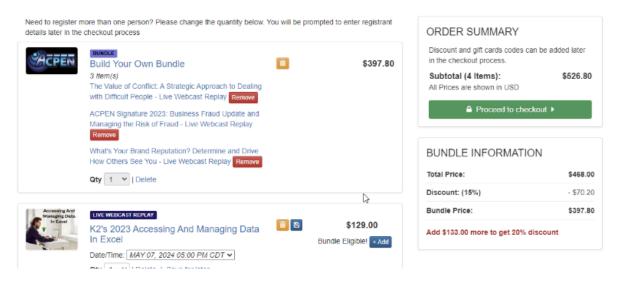
This new tab will soon house alerts, renewal reminders, SMS reminders, and more. Stay tuned!

Build Your Own Bundle Update

If you opt for Bundle Type 5, which is the "Build Your Own Bundle" option, we have made it incredibly easy for your users to add products to the bundle from anywhere on the site, even once they've already reached the shopping cart. If a product is eligible to be included in the Bundle, users will see this option next to the item in the cart, which will allow them to build the bundle while still in the cart.

Search For	CPE	Global Search on Sem	nars, Speakers				Search	L Sign In	Cart	0
Iome ACPEN	Signature	Benefits and Discour	its 👻 Group Viewing	Micro-Credentia	ls Discounted Bundle	Calendar	About ACPEN	Support		
hopping (eed to register m stails later in the	nore than o checkout p		ige the quantity below.	You will be prompt	ed to enter registrant	Disco in the Subt	DER SUMMA unt and gift cards checkout proces total (4 Items): ices are shown in	codes can be s.	added la	
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PERSONAL BRANDING	What's Detern You Date/Tim	CASE REPEAT Your Brand Reput nine and Drive Hov e: MAY 07, 2024 05:00 I Delete Save for	V Others See	ii 🗈 Bu	\$89.00 Indle Eligiblei - Add					
VALUE	The Va Approa Date/Tim	CAST REPLAY lue of Conflict: A S ich to Dealing with e: MAY 07, 2024 05:00	Difficult People	👅 🔊	\$129.00 Indle Eligiblet + Add					

As they add products to the bundle, the information will show in the sidebar giving them details about the bundle.



To learn more about how to create bundles for your products, please visit our <u>Bundle FAO</u> and reach out via the help bucket.

Custom Address Block Updates: Import and Reports

Using Customer Settings > Custom Fields, you can create Custom Address Blocks for your customers so that you can precisely track their "Office location" or "Home address" rather than just having one default, un-named address. Often, our AMS clients do this to manage sending newsletters or brochures to the appropriate address or to get legislative data about a member's home address versus office address. These have been very helpful for gathering that specific address information. However, until this release, getting the information imported into CE21 or getting that information out in the form of reports has been difficult. To alleviate this, we have released the following updates.

Import Address Blocks

When creating an import template, you can choose those custom Address Blocks from your list of available, importable columns. You will also want to select all the address fields you wish to import. This will flag that the address on that line is specifically a "Business Address" or "Home Address," etc. This is an excellent time to grab the Default Address and Directory Address columns, as you may set all of those at once.

In the template, you will find that the standard Address Blocks we provide (Default and Directory) and the custom address blocks you've built allow the values of Yes or No. If you leave blank, we will assume you mean No. Below is an example of the import you can do.

0	<u> </u>		L		0			-	N.	L		
										Business	Home	Office
Last	Email	Addross	Address	Address	City	State	Zip	Default	Directory	Address	Address	Address
name		Address	Line 2	Line 3	City	state	Code Ad	Address	Address	Address	Address	Address
										Block	Block	Block
Wise	lwise(8400 Cha	#3		Aust	Texas	78748	yes	yes		yes	
Davis	bdavis	555 Nort	hern Lane		Aust	Texas	78745	ves		yes		yes
	name Wise	name Wise <u>lwise</u>	Last name Email Address Wise Iwise 8400 Cha	Last nameEmailAddressAddress Line 2WiseIwise8400 Cha #3	Last nameEmailAddressAddress Line 2Address Line 3WiseIwise(8400 Cha #3	Last nameEmailAddressAddress Line 2Address Line 3CityWiseIwise(8400 Cha #3Aust	Last nameEmailAddressAddress Line 2Address Line 3CityStateWiseIwise(8400 Cha #3Aust Texas	Last nameEmail AddressAddress AddressAddress Line 2Address Line 3City CityStateZip CodeWiseIwise@8400 Cha #3AustTexas78748	Last nameEmail AddressAddress AddressAddress Line 2Address Line 3CityStateZip CodeDefault AddressWiseIwise@8400 Cha #3AustTexas78748yes	Last name Email Address Address Address Line 2 Line 3 City State Zip Default Directory Code Address Address	Last nameEmail AddressAddress AddressAddress AddressCity Line 3StateZip CodeDefault 	Last nameAddress<

With this update, you can import and set one address as one or multiple address blocks. **IMPORTANT**! You cannot import more than one address per user per upload at this time. We are working on correcting that soon. At this time, we will provide an error report with addresses that fail; you can then upload those in a separate import. We apologize for this temporary inconvenience.

Report Updates

You can now pull all Address and Legislative details about those Custom Address Blocks from the <u>Accounts Report</u> and <u>Group Members Report</u>. When selecting your columns, you will find the Custom Address Blocks listed and the corresponding Legislative Information for each address block.

In addition, below those, you will find each Legislative detail broken out separately. Be advised that this is information for the account's default address. When you pull the details for a custom address block, you gather them all simultaneously rather than picking which legislative information you receive.

Office Address Address Block
 Office Address Address Block Legislative Information
 External ID
 National Senate
 Congressional District Number
 Congressional Representative
 State Upper House District Number
 State Lower House District Number
 State Lower House Representative
 State Lower House Representative

When you download the report, you will find those two types of columns output more than two cells' worth of data. See below for an example.

Business Address Address	Address	Business Address Address 2	Business	Address	Address	Business Address Country	Business Address National Senate	Business Address Congressional District Number	Business Address Congressional Representative	Business Address State Upper House District	Business Address State Upper House Representative	Business Address State Lower House District	Business Address State Lower House Representative
ch	These are the fields available when you choose the Address Block's "Address Block" Choose the Address Block's "Legislative Information"										Reput Na Reput Na Reput Na Reput Na	der Kalanitek Berlerite bissent Kalanitaten Barty Deyler	



New Features and Updates for the (24.05) 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

- We have updated the information at the top of the screen when you review Speakers, Customers, and Companies. Now, you will always see the default address at the top of the screen. You will also see only the phone numbers you choose to show on the user's edit profile page.
- Within a customer's account, the Merge Accounts tab now provides additional details about the account merge, such as who merged, the date it occurred, and the customer ID and External ID associated with the prior account.
- We fixed an issue with the Customer Account search that affected a few of you. That search has been optimized and should no longer give the error.
- Import update: You can now use the Customer and Member Import templates to import custom address blocks for your users. Please see the highlights above to learn more.

- API: Added (a) POST: /service/Customers/CustomField for adding new customer custom fields. (b) PUT: /service/Customers/CustomField for updating customer custom fields
- API: Added /service/Tenants/TenantInfo which allows users to retrieve the short and long name of the authenticated tenant.
- API: Added new Email service (a)GET: /service/Email/Categories for getting a list of all email categories (b) POST: /service/Email/UnsubscribeCustomer for unsubscribing a customer from an email category (c) POST: /service/Email/SubscribeCustomer for subscribing a customer to an email category

Catalog Appearance

- Fixed an issue where the custom SEO page title was not sticking for Membership marketing pages.
- When your users sign in, we take them back to the page they were on when they chose to sign in. This update will help your members easily navigate their member-specific discounts on products or bundle pages. Please note that we have kept that process the same if you manage your AMS elsewhere and use the Single Sign On (SSO) process to manage your users logging in. This update is only for our clients using our catalog for all user management. We will be updating the SSO logins in a future sprint.

Certificates/Requirements

- We fixed an issue where the certificates that you download or email from within the product match what the users see when they download from their accounts. A couple of live event-based tokens weren't working correctly.
- When you issue partial credit or reset a quiz on a program, a note will automatically be stored in the Notes tab in the user's account in Manager.

Email Marketing

• We fixed an issue where the count for Email Campaigns was showing the current Smart List count and not the count of the recipients of the email campaign. Please note that the correct number of emails were delivered.

Forms

• Within each Form, there is now a direct link/button on the Submissions tab that loads the "Form Submission Report" with the Form already selected. Be sure to adjust your dates on the report.

Live Events

- Fixed all Avery template badge sizes to print correctly according to the template dimensions, not on A4 dimensions.
- Fixed the error where the Price Adjustment label was not working on badges.
- If you do not add the Total Credits to each agenda item, it used to hide the agenda item in your user's credit tracker. We have now fixed that so the agenda items are seen regardless of how you add the credit.

Memberships

• Fixed the issue with Child Groups not getting correctly added to the parent group's invoicing.

API

- Fixed an issue with the Membership Invoice using the Member Since Date when you use the Current Start Date message token.
- There is now an email tool within the group members list, similar to the one available to schedule emails on products. This tool allows you to send templates, send to certain member statuses, and review sent emails. See highlights for more details.
- The Renewed On Date is now a column you can select in the Group > Members table.

Products

- Fixed an issue where some speaker's credentials were displaying in a Virtual Summit while others weren't. Also fixed some spacing issues with the listing.
- Fixed historical chatroom (visible in the program's archive video) to use your correct local time zone instead of UTC.
- Fixed the issue of not allowing users to edit page count on handouts uploaded to products.
- We fixed an issue with a template where you couldn't delete the date. We also fixed the issue where cloning always brought over the date of the event even when it was not selected to be cloned.
- You can build a Classroom using Video Replays, allowing users to select dates according to their schedule. Before now, there wasn't a good way to see who had yet to choose all of their dates. Now, in the Current Registrant table on the Classroom, there is an "All Dates Chosen" column where you can see if the users have chosen all of their dates (Complete) or not (Incomplete).
- You can now pull from or add to the Global Media tool when uploading images to the Bundle > SEO image or to a product template's SEO and Images.
- Fixed the issue where clicking the "Return to Virtual Summit" left your viewer tab open.

Reports

- In the Accounts and Group Members Report, if you use Custom Address Blocks, you can now choose a custom address block on those reports, and it will give you a series of columns for each address block selected, including the address lines, city, state, etc. You will now also find that each custom address block has its own Legislative information available to it, so you can now gather that info for each address the user has entered, not only the default address.
- We have added a Renewed On Date to the date type filter for the Group Members and the Company-Based Membership reports. This new date option filters the report based on the date the member renewed manually/early or automatically.

Sales

- We fixed the issue where the collected agenda or registrant-type data was wiped out when you changed the main registrant in the shopping cart.
- We have now provided a Select All option for products in the Sales > Price Adjustment template area, where you can add price adjustments in bulk to all of your products.
- Build Your Own Bundles: If you use the Build Your Own Bundle feature on your catalog, your users can now add items to the bundle from within the shopping cart, making it even easier for them to bundle their products.

Smart Lists

• Fixed Smart List issue related to Customer Account Tags.

Support

• When one of your staff members is no longer with the company, and you mark them as something other than Active (Suspended, Inactive, Terminated), we will now prompt you to assign a new user to any escalation paths they were a part of and give you a way to assign a different staff member to any open Support ticket directly assigned to that user.

Videography

- Fixed issues with course tracking and slide pop-ups when the course was under 3 minutes long.
- We now show the audio meters in the presenter so you can monitor the overall volume of your webcast's audio.