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 Catalog Login Settings) 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.
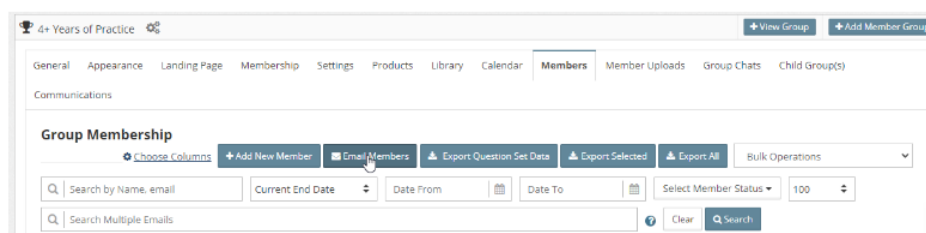
You can email selected users or those who meet status criteria at the time of the email delivery.
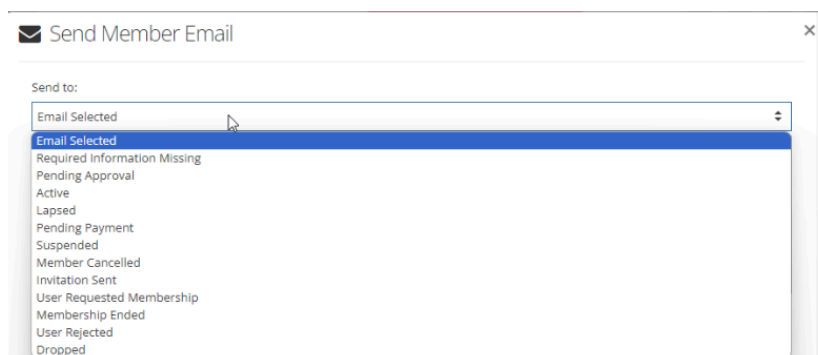
You can choose who to send the email from and either select from any "Group Member" recipient-based template or choose no template and email on the fly instead. Membership and user message tokens are available for use.

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.

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.

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.
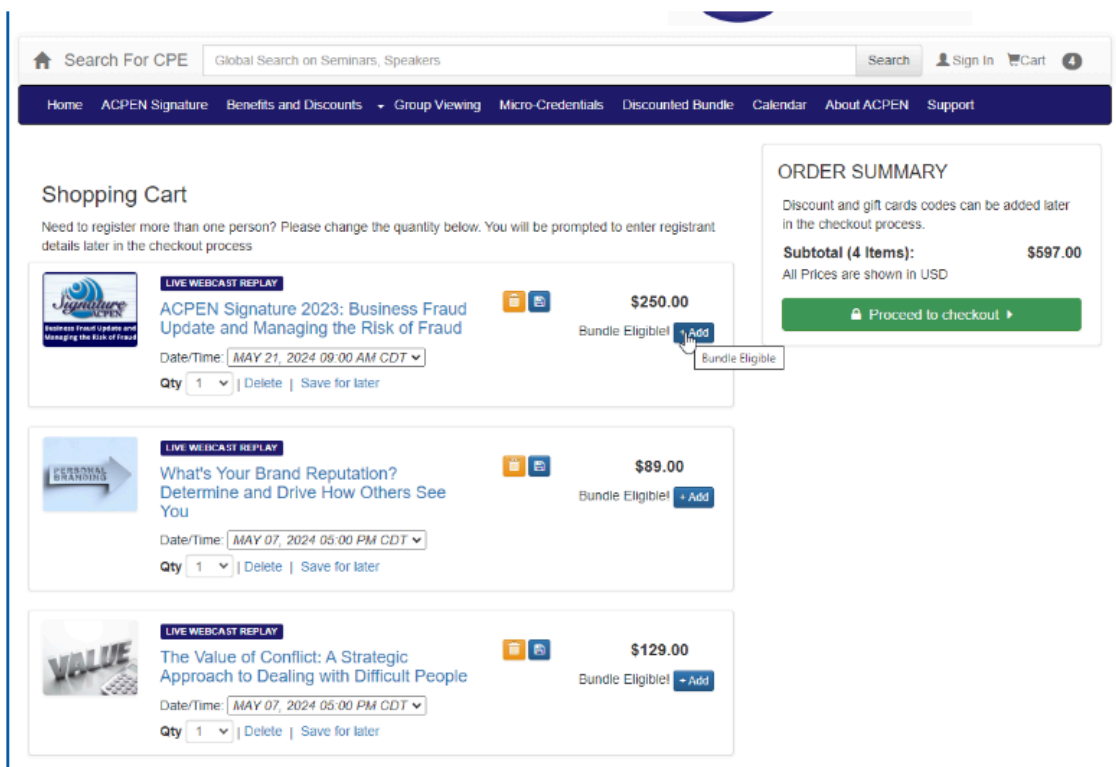
As they add products to the bundle, the information will show in the sidebar giving them details about the bundle.
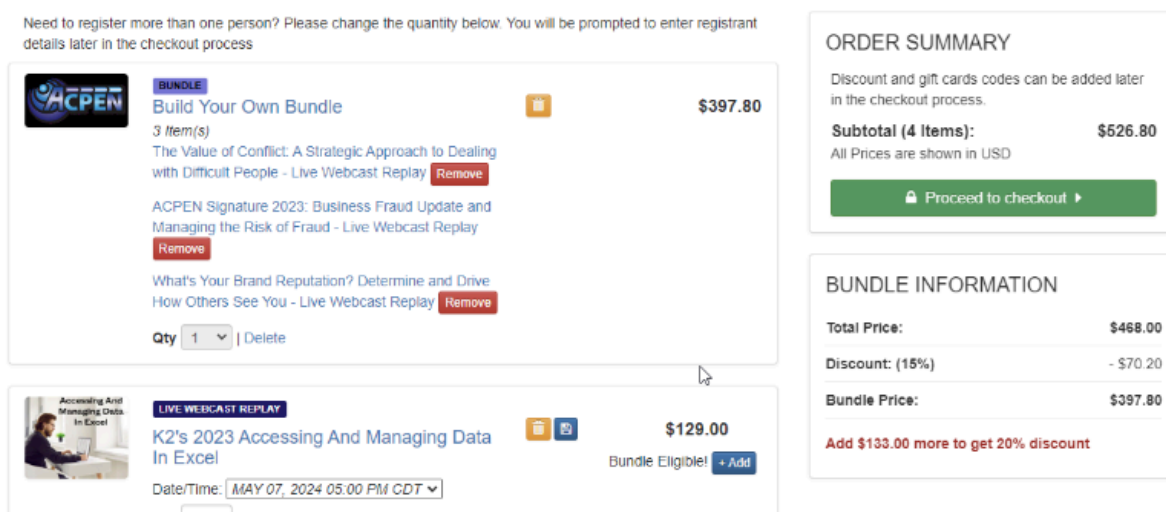
To learn more about how to create bundles for your products, please visit our Bundle FAQ and reach out via the help bucket.

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.

First name	Last name	Email	Address	Address Line 2	Address Line 3	City	State	Zip Code	Default Address	Directory Address	Business Address Address Block	Home Address Address Block	Office Address Address Block
Lisa	Wise	lwise(	8400 Cha	#3		Aust	Texas	78748	yes	yes		yes	
Brade	Davis	bdavis	555 Northern Lane			Aust	Texas	78745	yes		yes		yes

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 [Accounts Report](#) and [Group Members Report](#). 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 Upper House Representative
☐ State Lower House District Number
☐ State Lower House Representative

This is the Legislative information for the user's default address

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.

These are the fields available when you choose the Address Block's "Address Block"

These are the fields available when you choose the Address Block's "Legislative Information"

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

- 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.

- 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.