Here are your highlights for Release 24.06. Please check Page 5 for all our new features and updates.

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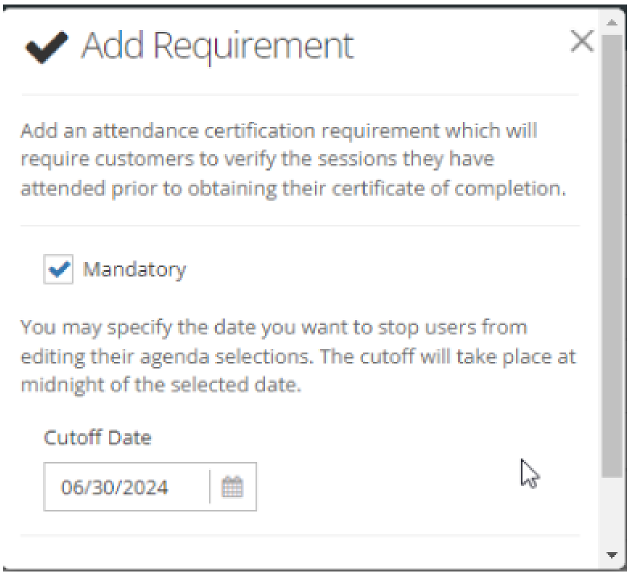
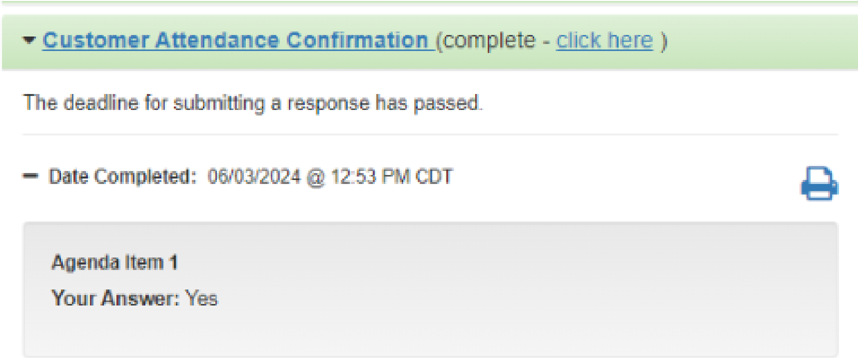
VP Product

Live Events - "Customer Attendance Confirmation" Update

Suppose you are creating a Complex Live Event and using the Customer Attendance Confirmation, which allows your users to let you know which agenda item they attended. In that case, we have added a new date field that will prevent them from answering or editing their selections after the given date. You can now set a hard date so you can submit their credit information to any necessary boards without the fear that someone may come and update their data and mess up their certificate. This Cutoff Date is available when you add the certificate requirement.



Cutoff Date is not a mandatory field, but if you use it, the registrants can no longer edit their agenda item selections at midnight on the selected date. Instead, they will see their selections with a message that says the deadline to submit a response has passed. If they have never filled out the form, they will see grayed-out checkboxes along with the message.



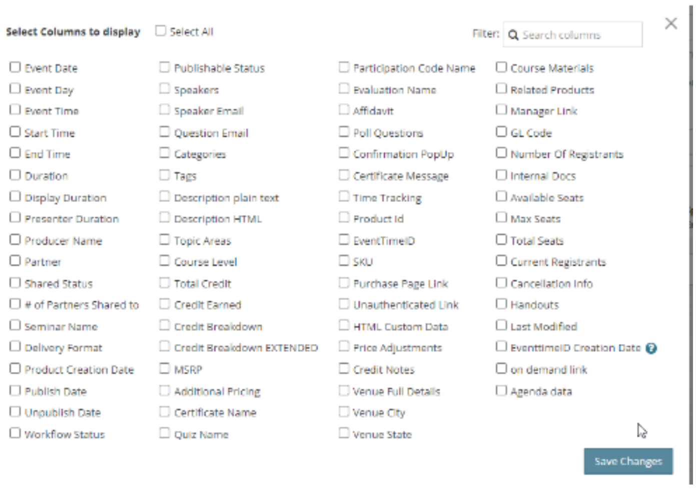
Handy Column Chooser and Table feature

Shift + Click to select multiple items in a table or list

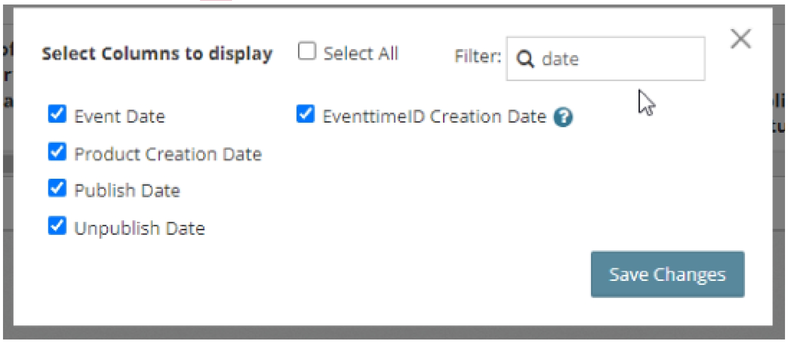
You can now use the shift + click button combo to select multiple items in a checklist. Let's say you want to choose a subset of people, columns, or products. Where you see a column chooser or a table, you can now select the first item, then hold down the "Shift" button and click the last in the list that you want to select. Check out this quick video showing how to use this button to save time on reports and elsewhere.

Column Chooser Filter

We acknowledge that some of our reports contain numerous columns, which may not be consistently located from one report to another. As we focus on creating customizable reports, we aim to simplify finding a specific column in our existing reports. Similar to the search function in the top left corner of the Navigation menu or Catalog Settings, you can now search for a column by typing, and the list of matching columns will gradually narrow down as you type. For example, a Product Detail Report has several different date columns. With the new search feature, you transform the list of columns from this hard-to-parse list:

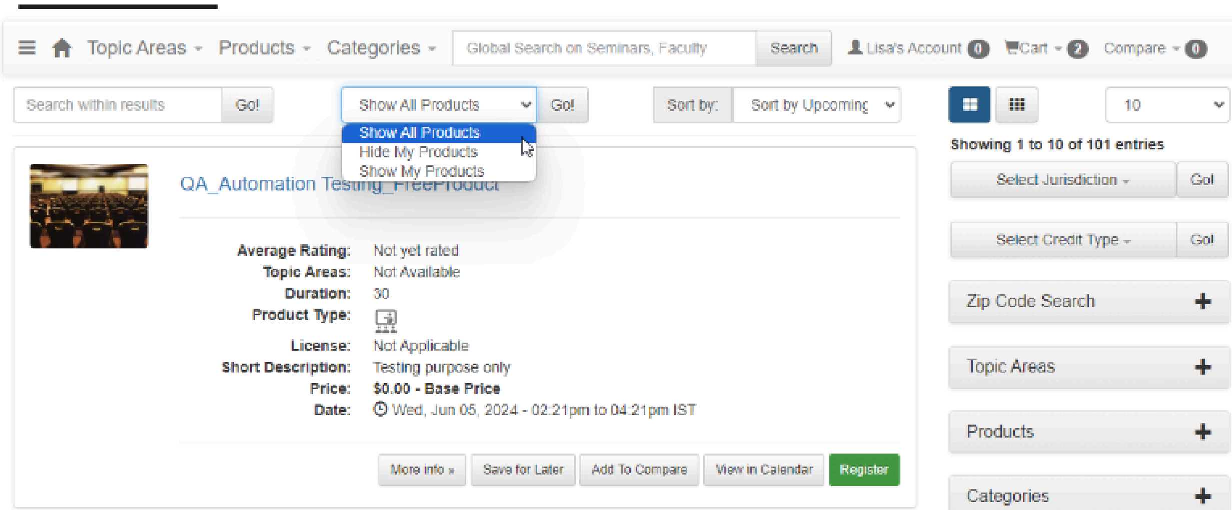


To this much easier to manage list of columns:



New Quick Search filter

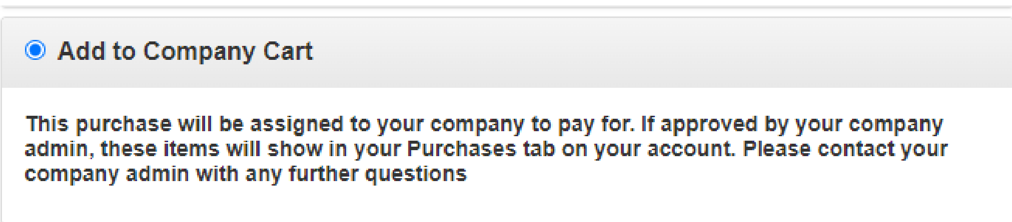
We have updated the search page by moving the credit filters to the sidebar. In the area where the credit filter(s) used to reside, there is now a quick-filter option that allows your users to narrow down to show only those products they've already registered for, or to show only the products they have not registered for yet. Of course, this is only available once a user logs into the catalog.



By default, the search results will return All Products, which operates as it always has. Users can choose to Show or Hide My Products.

Company Purchase: New purchase tools for Employees

Once an employee assigned a purchase to their company cart for their admin to purchase, it was a bit of a black box for the employee. Now, employees will have more insight and control over purchases in "limbo."



When the registrant/employee chooses this "Add to the Company Cart" payment option, the product will show in their list of products with three new options.

- Pay Now: This option allows the registrant to go ahead and pay. This may be helpful if they know their admin is unlikely to pay or slow to respond. Clicking this button will re-load the product into the shopping cart where we will ensure there are no price or availability changes before finalizing the payment.
- Remind Admin: This will resend the email notification to the company admin(s), letting them know that an order is pending payment.
- Cancel: If the user cancels the order entirely, they can choose this last button to remove it from the list of courses for the admin to buy.

Please remember that these company cart orders are not pending orders like POs or Checks, where these people show as registrants. Before the Company Admin pays for the items in the cart, it is the same as someone simply having products in their shopping cart.

New Features and Updates for the (24.05) Release

If you have any questions about this release's features or functionality, please submit your comment or question via the Help Bucket in the Manager, and a CE21 Team Member will contact you.

Accounts

- Fixed the issue preventing the Magic Link log-in option from appearing in specific catalogs when the settings that prevented customers from creating an account were turned on.
- Fixed an issue where triggered Customer Settings fields appeared in users' accounts even if they had not triggered the question.

API

- Fixed an issue with the Zoom polling results not carrying over if there was a mismatch in the user’s email address capitalization.

Catalog Appearance

- As discussed in a recent email, we have moved all your catalog account pages into our My List 2.0 layout. If you find any errors or want to revert to the old view, please contact the help bucket. We can move you into the old view if you would prefer. *Please note that we will no longer be updating that old table view.*
- We cleaned up the Registrant Confirmation page in the shopping cart so that adding additional registrants is laid out better and easier to understand.
- We fixed an issue with the Play button on the product image on the user's account. It now operates the same as the other launch buttons for the program or in classroom and virtual summit schedules.
- We fixed an issue with the Price Adjustment early bird feature, which was incorrectly showing the price's expiration date on the product details page.
- We fixed the time zone display issue with My List 2.0 (the new user's account page look/feel) when you allow users to select their time zones. If you want to enable this time zone feature for your users, you can find it in the Customer Settings area using the Time Zone field. This can allow your customers to more easily track when your live programs start when they are in a different time zone than your catalog.
- We now have a quick "My Products" filter on the catalog Search page, allowing your users to avoid or find the products they have registered for quickly. *Refer to the detailed instructions above*.

Certificates/Requirements

- Launch Count: We now count anytime users click the Launch Webinar or Launch SCORM buttons within their account. This means we can better track the launch count for your billing purposes. Please note that if the user gets a link directly from Zoom instead of logging in and launching from their account, we cannot track that launch count, though we may still have their attendance and polling information.
- We now track when and who resets a quiz for your users if they call us to do so. Also, we have updated our process to ensure we escalate any quiz resets to your escalation path on file since this means your users will have failed to pass the requirements you established.

Companies

- When a user adds a purchase to their company cart during checkout, the employee can view the pending purchase/product when they log into their account. They can then pay for the order themselves or send a reminder to the admin to make the purchase. *Refer to the detailed instructions above*.

Email Marketing

- We fixed an issue with sending large emails through the Email Marketing tools. If you sent a huge number of emails, the report would time out when you tried to open them.

Live Events

- Live Events that use the "Customer Attendance Confirmation" (where the user tells you what agenda items they attended): You can now set an end date when you want to stop allowing your users to fill that information out to get credit. Once that date has passed, they can no longer select an agenda item, and a message will appear telling them that the deadline to submit a response has passed. *Refer to the detailed instructions above*.

Manager

- We have fixed many of the pop-up windows in Manager to be larger, making them easier to read and use.
- We fixed an issue with imported memberships: now, if a question set exists for those imported memberships, you or the member can edit it to fill in any missing data.
- For Membership invoices, in the Sales > Invoicing area, you can now filter by billing cycle to find invoices for members in specific billing cycles.
- For SMS and Email Payment Reminder rules for your memberships, you can now message your users "After Successful Payment" to thank your members when they pay. We have added more clarity to the area, providing the template's name as you defined it and clarifying the meaning of Before and After Invoice Date.
- The Groups > Members Tab has a new column to choose from: End Date. This column gives the date the membership was suspended, canceled, or ended.
- Members can now enable autopay, update their existing autopay, or upgrade their membership if they have an outstanding invoice all in one step.
- We've implemented a feature that allows you to search for multiple email addresses within a membership. Previously, changing these users in bulk would return an error even though the bulk operation had been completed successfully. After completing the bulk operation, we've fixed this issue so you will no longer receive an error message.

Products

- We fixed an issue with the Classroom template not importing the individual modules when you create a course from it.
- We fixed the CKEditor in the Registrant Type Question Set. Now, you can ask questions your users can answer in rich text while registering.
- We have some cool features that will make selecting from a checkbox list or column chooser much easier. You can now shift+click to choose multiple items in a checklist. Along with that option, when opening a "column chooser" tool, there is now a handy feature that allows you to search the columns for the one you want! *Refer to the detailed instructions above*.
- We have updated the Purchase Extensions found in Catalog Settings > Product Settings. They enable users to access a video for a fee after their initial access expires. You can now specify whether users should be allowed to purchase the event after the product is no longer published. For dated events, you tell us how long past the unpublish date you want to sell the extension, and for non-dated events, you simply tell us if you want to sell the extension after the program is no longer for sale.
- When creating a backend order, we automatically fill in the user's name in the billing name information to make it easier for you to complete those orders. You may change the billing name to a different one if you need to.

Reports

- Classroom and Virtual Summits on Completion Reports: Now, you can enter the name of the Classroom or Virtual Summit in the search field on the Completion report. If you also check the setting to "Show individual Classroom components," it will give you the details for the overall classroom and all of the modules the user completed.
- Classroom and Virtual Summits on Registration Reports: Now you can enter the name of the Classroom or Virtual Summit in the search field on the report, and if you also check the setting to "Show individual Classroom components," it will not only give you the details for the overall classroom but all of the modules within the classroom as well. This feature isn't as handy as it is in the completion report. However, the Registration report does have a completion type filter to

narrow down to only completed or incomplete registrations, which may be helpful when determining where the completion gaps are for your users.
- Company Report Update: We have added two new columns: "Admin," which lists the email addresses of all admins, and "# of Admins," which tells you how many admins there are in each Company on the report.
- Company-Based Membership Report: This report also has the "# of Admins" column added.
- Product Detail Report Updates: You can search without dates on this report if you select "show only active products." We also fixed all dates and times in this report to be dates and times so they sort correctly. We updated some date labels to be more straightforward. We now have a "Product Creation Date" and a new column for "EventtimeID Creation Date." Typically, these two dates will be the same unless you are building Video Replays and have added new dates to an older video replay. Sales Fixed an issue that allowed guestbook registrants to re-register for a product after it expired when the product wasn't supposed to allow them to register for the same product twice.

Sales

- Fixed an issue where a price adjustment was shown on the catalog as giving a $ amount off rather than % off as it should have.
- For Bundles 1-4, we have fixed the issue where agenda item selections were not requested when adding a live event to your bundle/cart. We recently fixed this issue for bundle 5.
- We fixed an issue that occurred when you changed a user's invoice, but they already had it loaded into their cart. We will no longer let them check out with that outdated amount but rather have them reload the cart to get the new invoice amount.

Videography

- Suppose your product has a different Catalog Display Time Zone than your catalog’s default time zone. In that case, when you set up participation codes or review those codes in the presenter, you will now see that product's Catalog Display Time Zone. Thus, you don't have to break your brain doing time zone math to figure out when the codes should show locally.
- You can now edit the participation codes in the Presenter without as many clicks. Click on the time to edit it, and hit enter to save automatically.