

RELEASE  
24.07



UPDATES + RELEASE NOTES

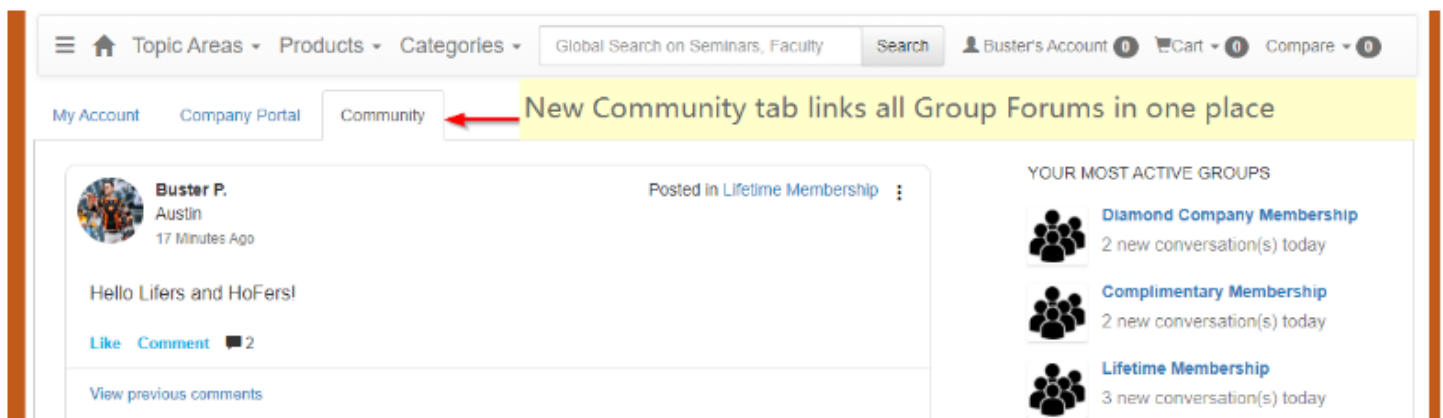
Here are your highlights for Release 24.07. Please check Page 3 for all our new features and updates.



**Lisa Wise**  
VP Product

## New Area Available for Members: Community Tab

We have created a Community portal on the user's account page to facilitate chats with others in the same groups. This is a new tab at the top of the user's account page, similar to a Speaker Portal or Company Portal. This area lets members quickly see all forums within their memberships, communicate with other members, and stay updated with the latest conversations.



In the future, we will also add forums from programs they have attended. We plan to introduce more features to make online networking easy for your members straight from your CE21 catalog.

## Zoom Updates

One main focus in this sprint was dealing with some Zoom updates that will make gathering data about your attendees, adding speakers, publishing, and more easier for your Zoom-powered webinars.

### Adding a New Panelist

This update is only for Zoom Webinars. Speakers at meeting-type events are not panelists, so they do not need to log in in any special way to participate as panelists. Before, if you added a new panelist after reserving the webinar, you had to go into your Zoom account and add the panelist and the CE21

Manager to the webinar. Now, when you add a speaker in CE21 after you have reserved the webinar, we will automatically send that speaker information to Zoom for you!

## Fixed common critical error: Registration Required.

There is a setting in Zoom that must be turned on for our tools to work. At times, this setting isn't set correctly, which leads to errors for your users if they try to launch the program. Since this can be disabled at any time after reserving the event, we will check on every registration that the setting is enabled, and if it is not, we will correct that.

## Less Restrictive Release Rules

You can now release a webinar even if it no longer exists in Zoom, has been converted to a different type (Webinar converted to Meeting, for example), or the program has started. Please remember that it is always best to release and re-reserve in CE21 rather than messing with the Zoom tools to change the time, meeting type, etc.

## Update Webinar Settings Tab Layout

Much of this update to the Webinar Settings tab is to lay out the information more nicely. There are a few updates to the information you receive on that tab. One of these updates will need your action if you would like to gather that information (see #6 below).

Seminar Data Logistics Information Images and SEO **Webinar Settings** Reviews Related Products/Sales Marketing Payment Plan

Internal Resources

Webinar Settings

CE21u Sandbox webinar "Manager > Webinar > Webinar Settings > Facelift / rearrangement of Reserved Webinar" has been reserved on zoom meeting v2 at 07/02/2024 from 02:00 PM to 02:10 PM

Open Meeting Release

Webinar Service: zoom meeting v2 (Max: unlimited) Total Number of hosts, panelists, organizers and staff: 1

Host Account: Natalee Peak

Webinar Type/Access: zoommeeting525OAuth (Private) Max Registrants:

Meeting ID : 89672178764

Zoom Meeting Password: k3fbidax

Email Notification : This setting will turn off the registration emails that are sent by Zoom.

Total Registrations to Date: 1  Disable Email Notification

Type: Meeting

Post Event Attendance Information Sync Zoom Poll Presenter Viewer Regenerate

Scheduled Total Time: 0 Hour 10 Minute(s) (600s)

Actual Event Time: 0 Hour 10 Minute(s) (600s)

1. We have moved the information about the reservation and the Open/Release buttons to the top of the tab.
2. This area now has two columns so that you can see more details simultaneously.
3. If there is a password for the event, it is now directly below the meeting or webinar ID details.

4. Once the Attendance Information or Zoom Polling has been synced, the button will change from red to green.

5. We now show the total scheduled time of the event. This is the information you enter into CE21 for the program schedule.

6. You can also choose to show the Actual Event Time, which takes into account if the course is ended early. This is the feature that you will need to update a scope in Zoom to start gathering. You can find our Webinar setup guide [here](#). Find the Scope section of the document, and find the Report area. Point iii tells you which webinar detail report you must include in your scope to see this Actual Event Time information. Please note, this is not a mission-critical scope. It is only provided if you'd like more information.

```
i. View a meeting | meeting:read:meeting:master
22. Report:
  a. View report data (3 total scopes)
    i. View meeting participants reports | report:read:list_meeting_participants:admin
    ii. View webinar participant reports | report:read:list_webinar_participants:admin
    iii. View webinar details reports | report:read:webinar:admin(added 6/14/2024)
```

## Event Portal

Besides the release notes you see here, much of this sprint was focused on putting the final touches on phase one of our Event Portal. We're so close. Stay tuned as we plan to roll that feature out in August.



## New Features and Updates for the (24.07) 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.

### Accessibility

- Made some adjustments to improve the accessibility of the catalog by fixing issues related to "tabbing through" and repetitive help text on buttons.

### Accounts

- We made a few changes which improve the Customer Search efficiency in Manager.
- When searching for members on the Accounts > Customer page, their group memberships are now easier to view and can be expanded or collapsed using a tool. Active memberships will be

displayed before any previous memberships. This update also applies to the Company Portal in the catalog, making it easier for your company admins to view their employees' memberships.

## Catalog Appearance

- For users reviewing their certificate window (from their Account page) on their phones, it will now take up the full height of the phone instead of a small window.
- The issue with event date sorting on the Customer Account page in the catalog has been resolved.
- We have positioned the product type label above the image to prevent it from overrunning your product image and potentially any other wording you've added to it in a user's account.
- We resolved an issue where the Global Search feature was not functioning properly when a user viewed Manager on their mobile device.

## Classifieds

- Sometimes, a poster may not include an image with their classified ad. We have introduced a new setting in the fee plan that allows these ads without images to be posted with a default image or without any image. These imageless ads will consider this setting on the classified ads search page and details, but if you use the Classified Ad widget, they will utilize the default image thumbnail for better layout presentation.
- We fixed an issue with Classified Ad Forms that were marked as Employment style forms, but not showing the labels Salary or Employer when a user is filling in the form details.
- We updated the Ad Categories in the catalog, replacing the dropdown with a more visually appealing set of pills.
- When a person uses the CE21 email tool within the classified ad to email the Seller or Employer, we will now include the contact information the user enters when filling in the email form. In addition, within the user's Classified Ads tab on their account, they will now see this contact information in the "Replies" table.
- When previewing an Ad Form in Manager, you would see the HTML of any descriptive text you added. This showed correctly in the catalog but looked wrong in the Manager preview. That has been fixed.

## Companies

- When a new customer is created in Manager, you can now immediately assign them as an Admin in their company's Security Group (ACL).
- Depending on your settings, a new employee can now receive company member pricing when added during a multi-person registration.
- From the Company Portal in the catalog, Company Admins can now add new employees and set their Employment Status and Portal Rights simultaneously.
- When a company administrator rejects an employee's request for a company purchase, they must provide a reason. This reason is now included in the email sent to the rejected employee.
- Fixed the issue that was updating Company Settings when the company import updated fields on an existing company.

## Interaction

- We have created a new Community tab that aggregates all of the users' Group forums on one convenient page. *Refer to the detailed instructions above.*

## Live Events

- We fixed an issue on Agenda Items and Live Event Attendance where the Verify Attendance tool within the list of registrants didn't always stick once you selected it.
- If you have partially refunded an order with agenda item selections, you can now edit or view those agenda selections from within the order.

## Members

- Members who are active but have a payment status of Pending Payment will now be shown in the directory and can access member-only pages on WordPress sites using the CE21 plugin.

## Products: Webinars

- For webinars (not meetings), if you add a speaker after you've already reserved it, we will now automatically send that new speaker to Zoom as a panelist.
- We have updated the Webinar Settings tab to include more information and be clearer when reviewing the attendee details. *Refer to the detailed instructions above.*
- Sometimes, errors occur with webinars because the "Registration required" setting in Zoom is turned off, but this is essential to our tools' functioning. Now, whenever a user registers for the program, we will enable it if that's not already enabled for the event in question.
- We fixed the issue that was preventing published webinars from showing the Add to Cart button if no webinar service is reserved.
- We have enabled users to release a webinar that is currently ongoing or that no longer exists or matches in Zoom.
- Webinars: When an order is refunded, the user is removed from the registrant list in Zoom.

## Reports

- Donation Report Updates: We have updated the name of this report to Donation Report by Transaction. A new filter has been added to allow you to pull reports for users who renew annually or not. We have split the Donation Recurrence column into two columns, "Billing Cycle" and "Renews Annually." Finally, we have updated the "Balance" column to "Pledged Amount Due."
- The Quiz Completion report was adding user information to the report before they submitted their quiz. Now, only submitted quiz results are included in the report. Please note that users may not have passed the quiz, but they must have at least submitted it for their results to show.

## Sales

- We now require you to choose the limitation information for each Discount you create, even if the limitation is none, to prevent accidental 100% discounts due to unnecessary errors.

## Sharing Marketplace

- You can now include the Sharing Marketplace programs you've shared in that have no price restrictions to any bundle on your catalog. However, if those shared in programs have price restrictions, you can only include them in a Bundle Type 1.

## Viewer/Presenter

- Fixed issues related to Guestbook access after the program aired.
- Fixed viewing tracking issue.