Here are your highlights for Release 24.09. Please check Page 2 for all our new features and updates.

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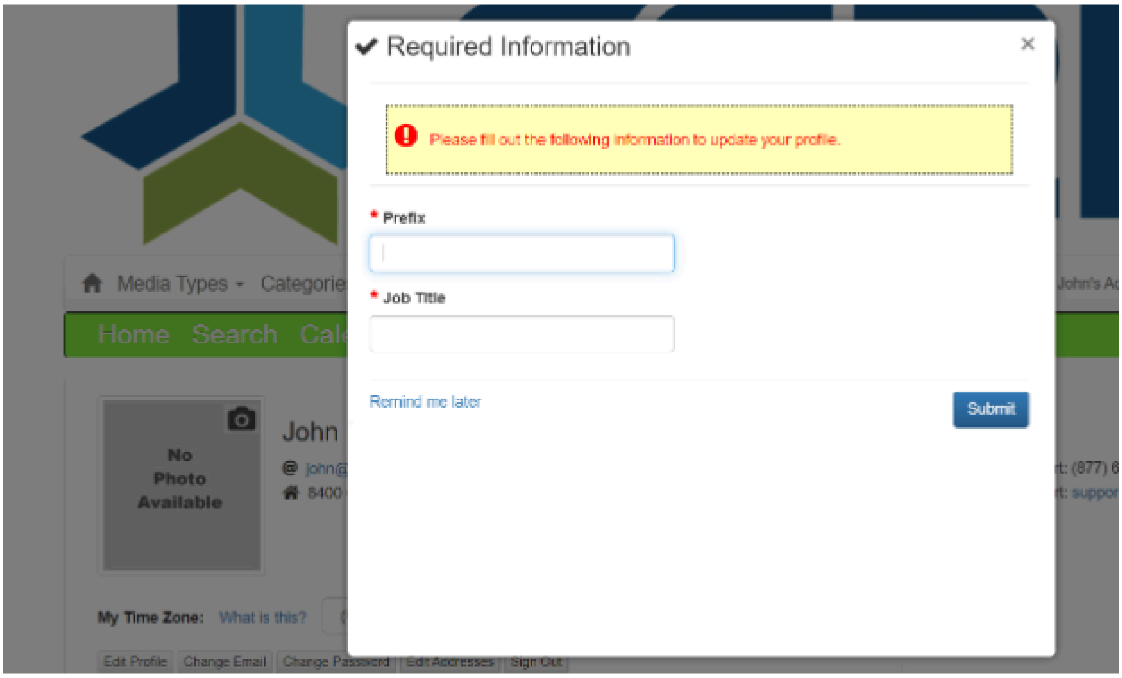
Lisa Wise
VP Product

Required Fields in your User's Account

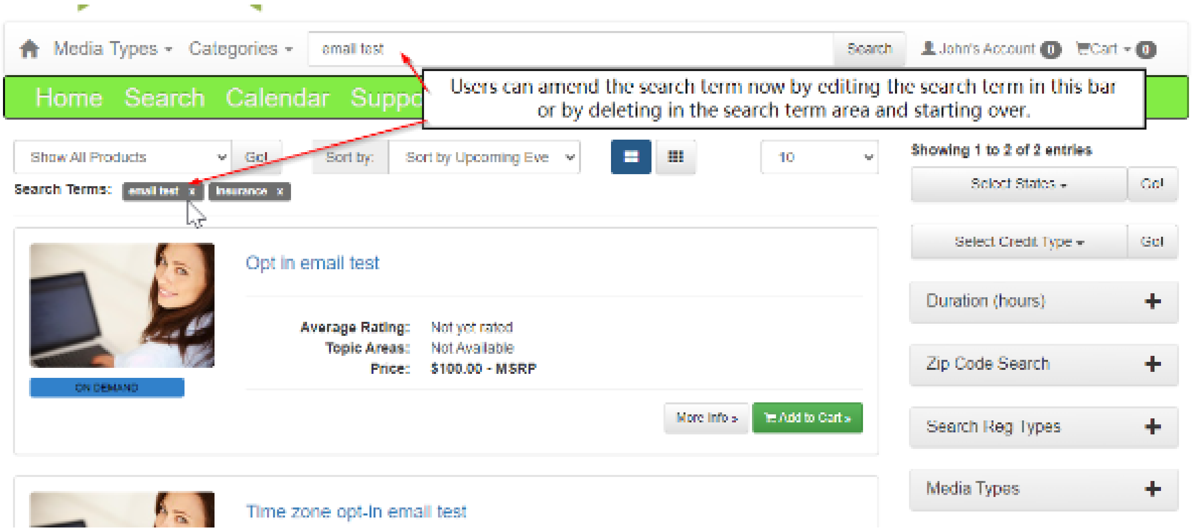
You sometimes need to change the information that you collect for your registrants or members. Occasionally, a registrant's friend may sign them up for an event without entering all the required information, such as a license number. In the past, we used to gather this missing required information when users accessed their certificates. We have just released an update that will display the missing information on the user's account page every time they visit, until the information is provided.

Once they navigate to their account page, we will pop up the required information in a window as shown below.



Updated Search Bar on the Search page

We noticed that having two separate search bars on the Search page was confusing for users. We have made changes so that now the search bar will only show in the main navigation bar and will no longer display in the contents of the search page. The search bar will also maintain search terms, allowing users to update the terms in the search bar to change what's showing on the page. This functionality is similar to common shopping sites like Amazon.



If yours is a catalog where this main navigation bar has been removed, you will still see the search bar directly within the search contents of the page. Nothing has been changed in your catalog.

Mass Email Marketing Update

We have updated our mass email marketing tool from its original Version 1 to a robust Version 2 and implemented a robust and interactive template widget and an email communications report to the report list.

We will begin billing for the service on October 1st. Please review this pricing sheet detailing the costs of using the mass email marketing tool. To sign up for this service, please reach out to CJones@CE21.com!

Review the FAQ on the Version 2 email tool. You can also register for the **Office Hours on 10/9/2024** where we will go over the tool in detail and answer any questions you may have.

Continue for the rest of the release notes.

New Features and Updates for the (24.09) 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

- We now remind people when they land on their account page if there are newly required fields that they must answer rather than waiting until they get their certificate. *Refer to the detailed instructions above*.

Catalog Appearance

- We fixed the order of the products in the sidebar "Product Type" widget so that it shows in the same order as the lists of product types in the catalog's dropdowns.
- We have removed the confusing second search window on the search page and now only show the main search bar in the catalog. If you have turned off the main gray nav bar, your search page will remain the same. *Refer to the detailed instructions above*.
- If you use the Outlook-style calendar and group all your media types on your catalog, you can now see them as one item rather than multiples of the same product. We have also updated the Outlook-style calendar to open a dialog with the program details rather than having to hover over the event.
- On Search 2.0, we fixed an issue where the categories did not show the proper results when selected from the menu dropdown and where some published products were not correctly displayed on the search page.
- We have fixed the issue where the user's address information was showing in the cart even though the setting was not to show address fields.

Directory

- For any inactive member who used to show in a Directory, if their directory link still appears in Google search results, we will redirect the person to the main directory rather than the inactive member's page.

Donations

- The Donations tab within a user's account now includes some search tools. These tools allow you to search by Donation and view completed, canceled, and recurring donations.

Email Marketing

- We have updated our Mass Email Marketing tool, making templates much easier to build now. *Refer to the detailed instructions above.*
    - To get signed up for this service, please reach out to CJones@CE21.com! (Pricing Sheet)

Imports

- We fixed an issue for company imports so that you can import existing employees as admins of a company.
- We fixed the Sales Import to ignore the leading or trailing spaces in the information provided to avoid imports that get stuck in pending.

Interaction

- For chatrooms you're moderating, we now immediately update the interactivity tools when you approve or reject a chat.
- We have made several updates that will improve the speed of loading forums when there is high traffic.

Live Events

- For the agenda item types of Section Header, Date, Time, and Number range, we have added the day field so you can select which day this applies to.
- We recently released an update that allows users to request information about agenda item selections from the person they are registering for instead of requiring them to know the answers and provide them. However, this update did not recognize the catalog setting, which prevented a user from registering for another user. While we maintained the requirement of not allowing users to register for others, this resulted in a poor user experience once the items were in the cart. We have corrected this issue so that if you do not allow people to register for others, we will not show them this option, which makes it appear as if they can.

Manager

- If you manage multiple tenants, you now have a Manager's dashboard that can give you an overview of all your tenants in one place. Go to Managers > Dashboard to see more.
- You can now import a CSS file into the CSS file import area. The fonts and styles in that file will be available when you access the rich-text editor tools throughout Manager. This way, you can customize your catalog content and certificates even more!
- When adding products to a bundle, classroom, or virtual summit, the show-only published products search feature will now appropriately limit the search results to those published or not, as requested.

Memberships

- We have added the message tokens {NextStartDate} and {NextEndDate} to membership invoices. These will show the dates for their next membership period rather than the current period, making it easier to send reminders for next year.

- For memberships that renew on a specific date, you can now adjust the end year when you change the group in the user's account in Manager.
- The prorating options now only display in the Group Renewal Policy tab when using a Specific Date membership renewal period.
- We updated the Company Based Membership "Auto-Add Employees" feature to allow new employees to be auto-added to company memberships when the membership status is Pending Payment.

Notifications

- If you use the Product Notification emails (formerly known as "Opt-In emails), and your products have multiple prices, the email will now include the price range instead of only the product's base price.
- In a Product, in the information or notifications tab, where all of the email reminders are shown, you can now select multiple emails and use the Remove Selected Email Reminders button.

Reports

- We added the County field to the column chooser for Company Report and Company Based Membership Report.
- We fixed an issue where some special characters were not showing up correctly when you exported registrant-type question set values on registration reports.

Sales

- We have added more information to the order details page to reduce confusion. Failed orders will now be clearly marked as "FAILED" at the top of the page. Since these products have never been displayed in the account, the Active/Inactive designation is no longer relevant, so we have removed it. Also, there will be no tools for these orders.
- We fixed an issue preventing users from joining a membership and buying the product simultaneously if the product was free.
- For pending checks, POs, or Pay Later orders, you can now swap a product if the price on the order has not changed.
- If the order was sent via API, there is now a spot in the order details to review the details of that API Call using the link in the order history table.
- We fixed an issue where the price difference between the initial sale and the new product wasn't correctly calculated when swapping a product on a sale.
- We have resolved the issue where price adjustments available to the registrant were not correctly considered when swapping a user into a different product in the Manager.

Viewer/Presenter

- We fixed an issue where On Demands were not correctly launching in iOS.
- Previously, the Archive pop-up message was only shown the first time a live event's archive was launched. We have now updated this to ensure that the message is shown every time a webcast, webinar, or replay archive is launched so that users are always reminded of the information provided in that message.

- In Presenter, we moved the countdown time to above the video preview for greater visibility. We also made space for the alerts and countdowns when reviewing the Presenter in smaller windows or mobile devices.
- In Presenter, we cleaned up the time zone functionality to make it more straightforward when managing a program across different time zones.