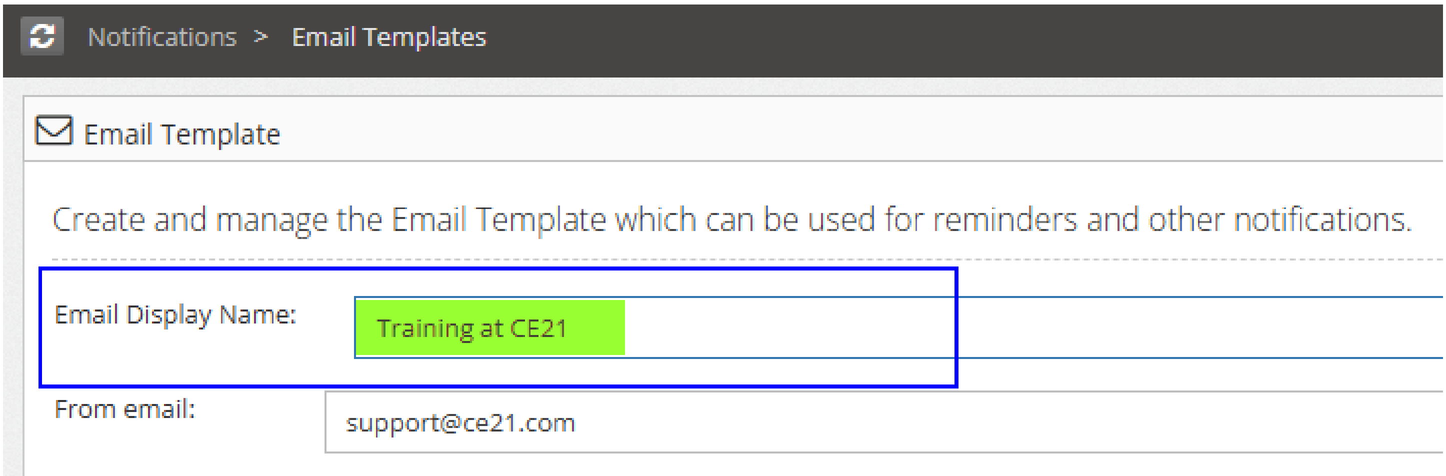
Here are your highlights for Release 24.11. Please check Page 5 for all our new features and updates.

Lisa Wise
VP Product

Important! Set your Catalog's Email "From"

In our latest release, we have introduced a new field for our Catalog Email templates that allows you to set the default email address for the "From" field. It is important to configure this setting, as it helps your users identify the sender of the email. Be sure to set this up here.



Please note that this "From" field is different from the one used for Email Marketing campaigns. This new setting is specifically for your catalog emails, such as Order Confirmations, Event Reminders, Password Resets, and more.

New Virtual Summit Analytics

We have updated the Analytics tab within the Virtual Summit product to offer more detailed information about your viewers, page visits, exhibitors, and more. We are still working on the Conference Pages and the "Program Viewers at a Glance" widgets at the top, but the remaining analytics and reports are improved, allowing for better insights into user activity.

For instance, you can now find more comprehensive reports under the Conference Level Reports, Page Reports, and Exhibitor Reports. These reports provide specific details about user interactions, such as who clicked on videos, downloaded documents, submitted forms, participated in forums, or simply browsed through the content. This information is now available at both the page and exhibitor levels.

Conference Level Reports

Reports detailing overall conference activity

Report Name	Tools
Unique Visitor Report with Page and Activity Views	⬇
Page Traffic Report	⬇

Page Reports

All Page Level Reports

Download all as an XLS Workbook

Page Name	Video Clicks Report	Documents Download Report	Forms Submission Report	Forums Report	Page Traffic Report	All Reports
Introduction	⬇	⬇	⬇	⬇	⬇	⬇
Course Schedule	⬇		⬇	⬇	⬇	⬇
Exhibitor page	⬇	⬇	⬇	⬇	⬇	⬇

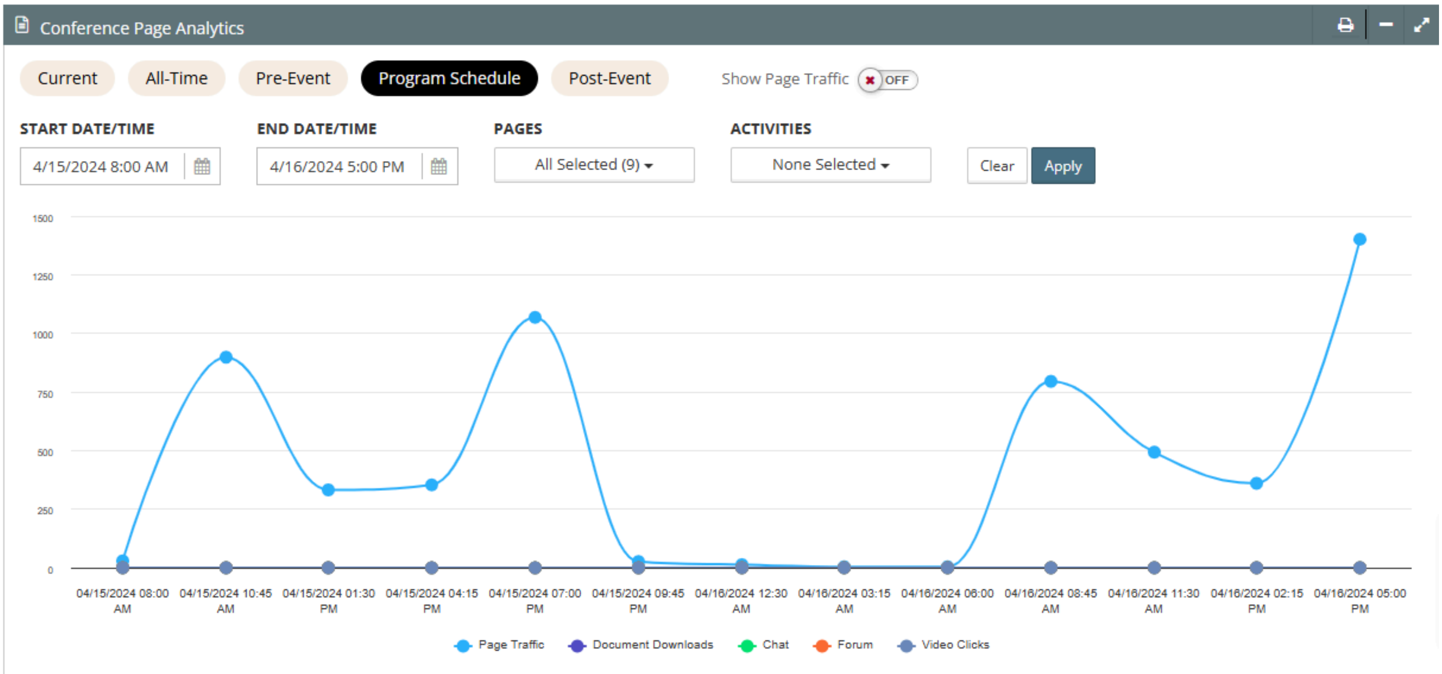
Exhibitor Reports

List of all Exhibitor Reports

Download all as an XLS Workbook

Exhibitor Name	Video Clicks Report	Documents Download Report	Forms Submission Report	Forums Report	Page Traffic Report	All Reports
Disney	⬇				⬇	⬇
CE21	⬇	⬇	⬇	⬇	⬇	⬇

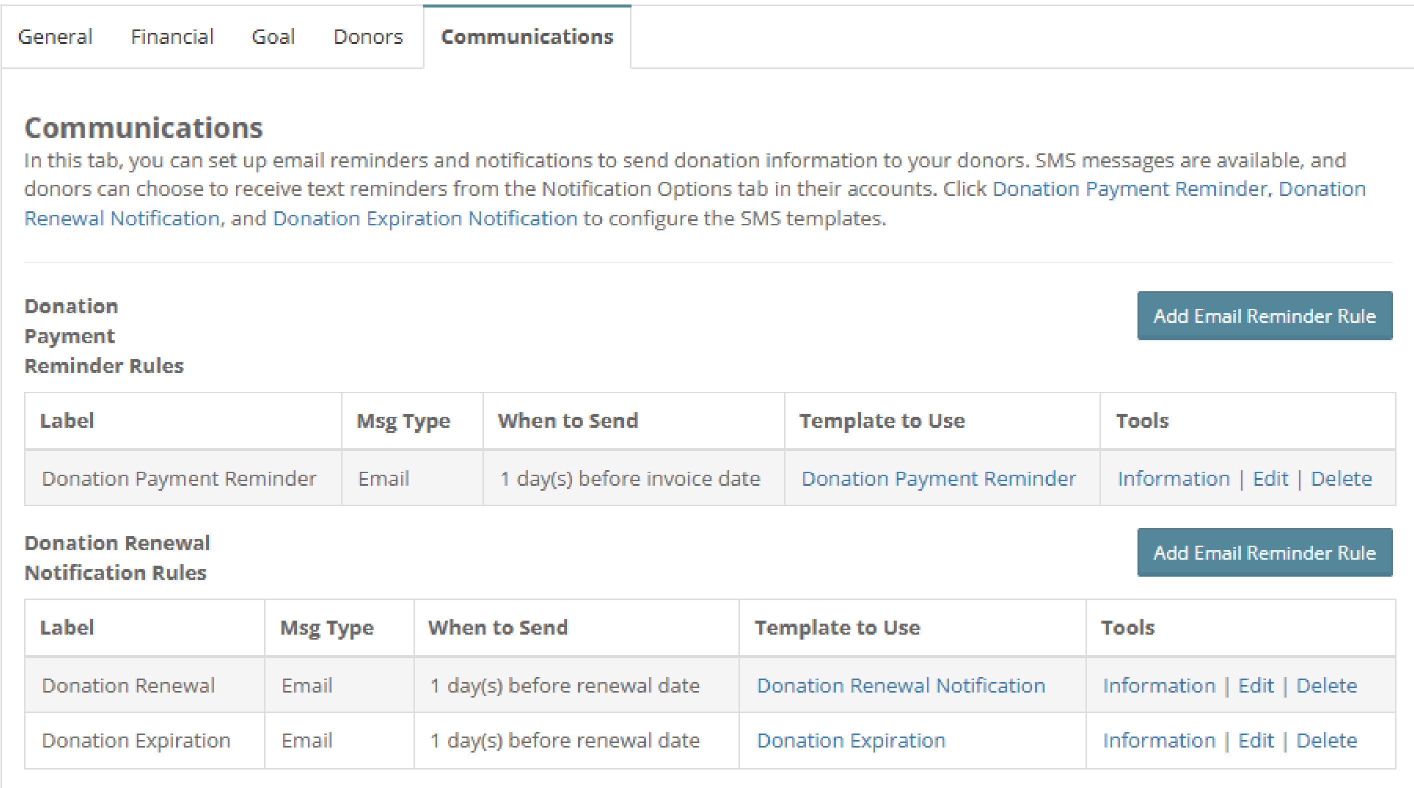
Below the list of reports available to you, you can also find the data in a graph based on either page view or Exhibitor View.



Page Name	Page Traffic	Page Traffic Percent	Document Downloads	Chat	Forum	Video Clicks
Introduction	481	7.84%	0	0	0	0

Donations Communications Tab

To simplify the process of reminding your donors to contribute again or fulfill their upcoming pledges, we have introduced a new tab for Donations where you can adjust the settings for email reminders. Additionally, you can view and edit your email or SMS templates. Donors will also have the option to sign up for SMS notifications regarding their donation payments within their Notifications tab in their account page on the catalog.


General Financial Goal Donors **Communications**

Communications

In this tab, you can set up email reminders and notifications to send donation information to your donors. SMS messages are available, and donors can choose to receive text reminders from the Notification Options tab in their accounts. Click Donation Payment Reminder, Donation Renewal Notification, and Donation Expiration Notification to configure the SMS templates.

Donation Payment Reminder Rules

Add Email Reminder Rule

Label	Msg Type	When to Send	Template to Use	Tools
Donation Payment Reminder	Email	1 day(s) before invoice date	Donation Payment Reminder	Information | Edit | Delete

Donation Renewal Notification Rules

Add Email Reminder Rule

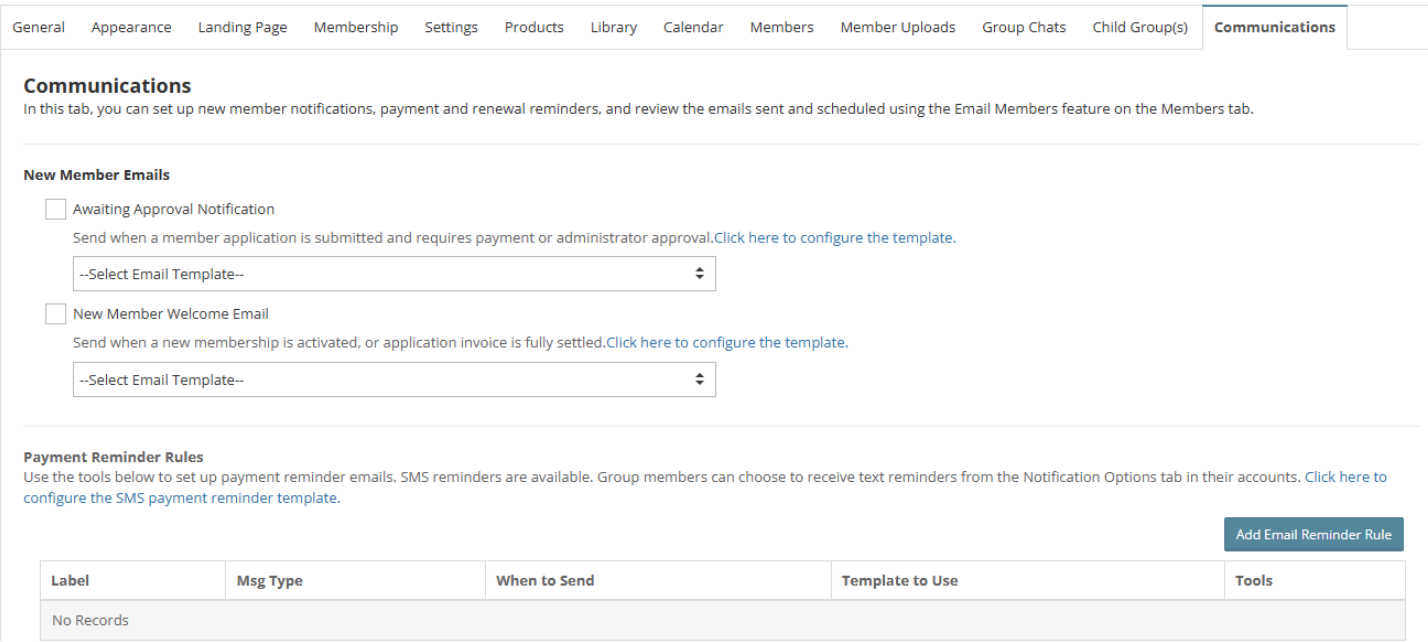
Label	Msg Type	When to Send	Template to Use	Tools
Donation Renewal	Email	1 day(s) before renewal date	Donation Renewal Notification	Information | Edit | Delete
Donation Expiration	Email	1 day(s) before renewal date	Donation Expiration	Information | Edit | Delete

Membership Communications Tab

We are excited to introduce a new Communications tab for memberships, similar to the one already available for Donations. This feature will allow you to quickly set and review all your email settings in one convenient location.

Instead of searching through various settings pages for specific emails, you can simply visit the Communications tab to view all your settings at a glance. This tab will provide you with easy access to details about new member emails that are sent out, which staff members are notified when approval is needed, and the Payment and Renewal reminders that are in place.

Additionally, the Communications tab will include information about previously sent or scheduled emails generated using the tools found on the Members tab within your group.

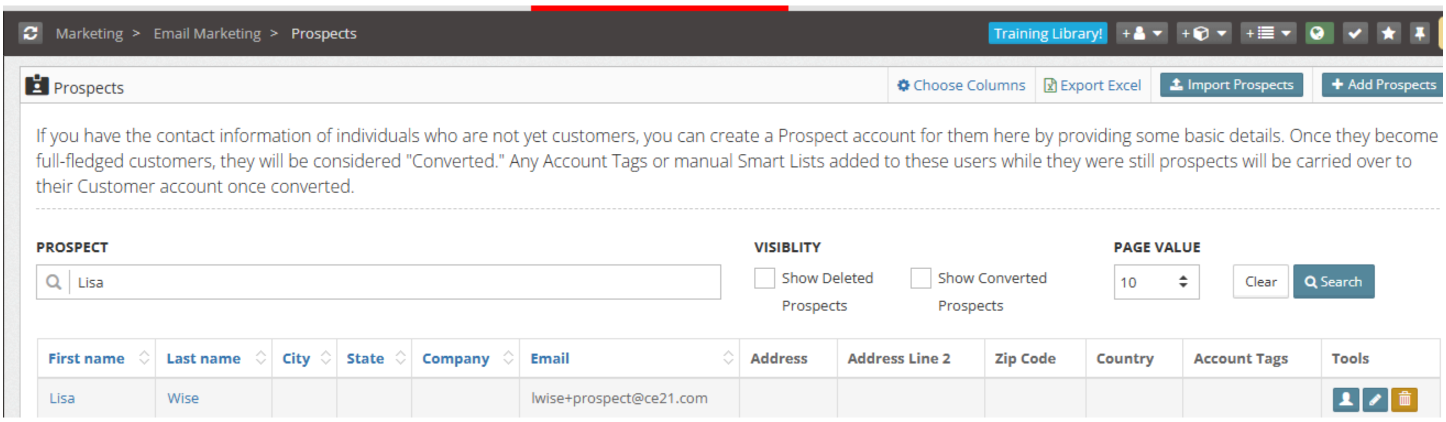


Email Marketing Prospects Accounts

We are excited to announce the launch of a new account type called "Prospects" for our clients using our Email Marketing tools. These accounts can be created through an import process, and you will be able to email these prospects using a manually created Smart List that you populate with these users.

Currently, Smart Lists do not automatically include Prospects, but we will be updating this feature soon. When a prospect creates an account on your site or is converted to a full account, all communications sent to them while they were a prospect will be retained as well as Account Tags.

To create Prospects, please import their details here.



Continue for the rest of the release notes.

New Features and Updates for the (24.11) 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 fixed the order of multi-choice values in the customer custom field dropdown.
- Fixed an issue on the reset password page regarding user input that adds a space in their email address.
- Resolved the issue that prevented bios added from the speaker portal in the catalog from displaying correctly on the speaker details page.

Catalog Appearance

- We added a search bar to the group product page, similar to the one recently updated on the catalog search page. This new search bar retains search terms, allowing members to edit their queries directly.

Classifieds

- We have enhanced your ability to create classified ads that stand out by allowing you to use bold titles and select different background colors. Additionally, we offer a feature to pin ads to the top of the list. You can set all of these options in the advanced features section of the Fee Plan.
- You can now set up discounts for classified ads, including the option to make the first purchase free. However, please note that you cannot apply a 100% discount for auto-renewing ads at this time. We are actively working on this feature and will have it available soon.

Companies

- In the company portal, and in the manager section, admins can now search for multiple email addresses simultaneously on the Employees tab.

Donations

- There is now a tab in the Donations section that allows you to set up reminders for sending email templates to your donors. *Refer to the detailed instructions above*.

Email Marketing

- There is a new account type called "Prospects." This type can be used alongside Email Marketing to send emails to individuals who do not necessarily have an account with you. *Refer to the detailed instructions above*.
- We have made an update to notify you when someone else is editing the email template that you want to work on. If this happens, you will receive a pop-up message. You can choose to either close the message or take over editing the template.
- We no longer lock the send date and time for scheduled email campaigns.

Interaction

- We have improved the forum experience in the viewer making it easier for users to find posts they've interacted with, and encouraging them to reply to the existing posts rather than seemingly pushing everyone to start a new post.
- We've made several improvements to the Community Discussions tab. Now, if a group hasn't enabled the forum, it won't appear in the discussions widget. Additionally, we've adjusted the sorting of the discussions widget so that groups with the highest number of posts and comments appear at the top, followed by a secondary alphabetical sort.
- When "Add all Faculty to Moderation" is enabled, faculty members will be included in the list of moderators, even if the chat or forum features are not activated.

Live Events

- We've fixed an issue in the Live Events Badges section where the "Print All" button on the badges tab included deactivated registrations.
- For Live Events, if you ask questions regarding the agenda items during registration, the purchaser can assign even that initial registration to a different registrant and request the user to fill out the information via email.
- Resolved an issue that prompted users to fill in non-required fields when printing their event badge from their account page.
- Event Portal: Resolved the issue preventing staff accounts from logging into the event portal without first logging into the manager at least once.

Manager

- We have updated the Analytics tab within the Virtual Summit product to provide more detailed information about your viewers, page visits, exhibitors, and more. We also plan to enhance the map and pie chart statistics at the top of the analytics section. Please note that we have preserved all previous data gathered for your event. However, since we have started collecting additional statistics, some of your data may appear incomplete. Moving forward, we will only be able to gather data from this point onward, and we will continue to do so for your next event. *Refer to the detailed instructions above*.

Memberships

- We added a setting for Smart List (Automated Group) types that enables the visibility control of that group on the user's account page.
- We moved all email notifications/reminders to the new Communications tab inside of each group. Making it easier to add or update the group emails. Please be sure to check here when setting up your membership email rules. *Refer to the detailed instructions above*.

- Fixed an issue that prevented free membership renewals from prompting users to answer their membership questions; now, users will be blocked from renewing if they do not complete their question set.
- Updated the staff notification for dues paid to clearly indicate the amount paid when a partial amount is written off or voided.

Notifications

- For all non-email marketing templates sent through the catalog, you can now add a "From" email address. *Refer to the detailed instructions above*.
- Updated the membership payment failure email template to "Payment Failed," which automatically triggers when an automatic dues payment fails. We also added email templates for automatic donation failures, classified ads payments, and payment plan failures that automatically trigger.
- The issue where Manager was not sending the password reset email has been fixed.
- The issue that was preventing the "Email Certificates" button in the product information tab from functioning has been resolved.

Reports

- On the E-commerce Errors page (located under Sales), an export option is now available on the Failed Recurring Payments tab. Additionally, the user's name has been hyperlinked, allowing quick access to their account from that page.
- We have created a new report called the Event Portal Report, which simply displays the number of registrations for each event that is enabled for the portal.
- For the "Touchpoint/Squeeze Report - with Surveys" report, we now include a "Referring URL" column since surveys can come from anywhere.
- We have sped up the Viewer Analytics Report and increased the font size to be more readable. You can now also select a year.
- We have removed the erroneous date limitation on the Product Detail Report. If you have show all active products selected, you can leave the date of the event off the report. There is also no date limitation if you want to run a report for more than one year.
- Email Communications report updates: 1. Added Product Title to the available columns. In the interface, it is even a link. 2. Fixed data issues. 3. Resolved the duplication problem with email templates not displaying the correct template name.

Sales

- We have updated our process with Affinipay ACH orders. We now review a webhook to check when ACH payments are disputed and fail later. When this happens at Affinipay, those orders will now be marked as failed automatically.
- When swapping a registration on an order that has a registrant type question set, if you are swapping to the same registrant type, the questions will be asked again, and we will keep the original information.
- To prevent double payment, we have removed the ability to pay now if the order is in pending ACH status.
- The issue that was preventing "pay later" orders from being processed in the Manager has been resolved.

- Resolved issue preventing check payments from accessing products, even with the setting to allow access before payment enabled.

Settings

- There is a new Shopping Cart settings so you can control how often the system retries a failed automatic payment.
- In Customer Settings, we have removed the "Address Name" field. It is an unnecessary and confusing field.

Smart Lists

- There are now two additional options for creating Smart Lists that utilize date fields in the parameters. You can select either a month or a year.

Videography

- Resolved the issue of some staff not appearing in the logistics tab when assigning a videographer.

Viewer/Presenter

- The mobile view of the archive message now displays better on smaller screens.
- Fixed an issue in the Presenter: when a video was muted and the preview moved on to the next video, it would unmute automatically. This has now been resolved.
- Fixed the tool in the Viewer to allow users to increase or decrease the transcript font size.