Here are your highlights for Release 25.01. Please check Page 4 for all our new features and updates.

Updated Check Process

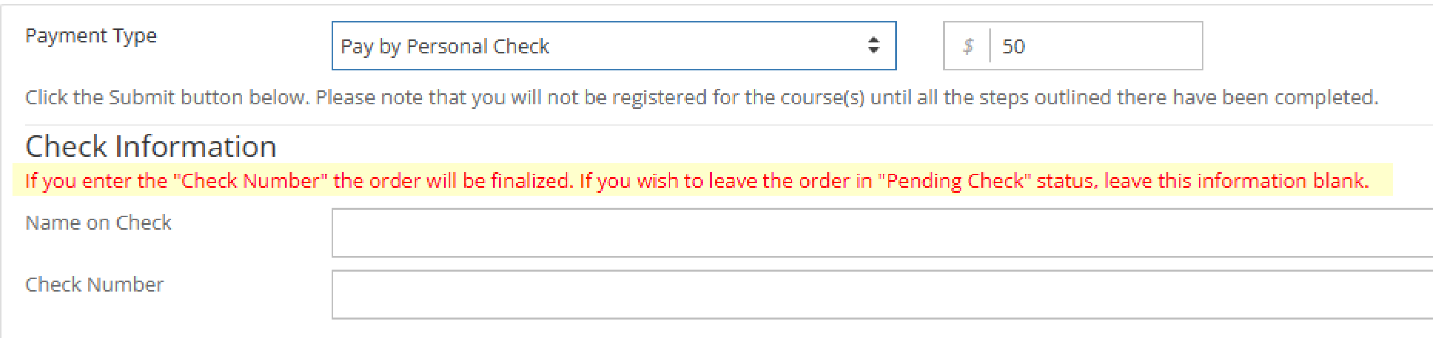
We have improved the Pay by Check (Personal and Company) process by eliminating a confusing step. Previously, if you were using all three of our check processing steps, users needed to submit a copy of their check before accessing the program. However, they still had to wait for full payment before receiving their Certificate. Now, orders will directly show as "Pending Check" or "Check Paid," and access to their course before you receive the check is entirely handled by a setting many of you have already been using for years.

What this means for you:

Most of you have already set up your pay-by-check templates to eliminate the middle step by not mentioning it. For you, everything will stay the same, and any pay-by-check templates you've created will remain as is.

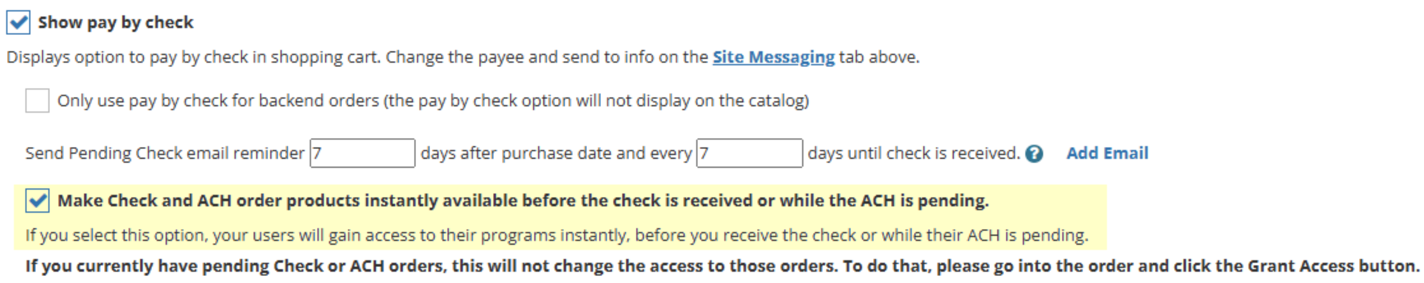
If you have included the intermediate "Check Documented" step in your process, please note that you will need to change your templates in Catalog Settings > Site Messages to remove it. If CE21 handles your checks, we have already updated the template for your account.

When creating an order in Manager, entering the check details will be the same as telling us you have the check in hand, and the order will be marked as paid.


Payment Type
Pay by Personal Check
$ 50
Click the Submit button below. Please note that you will not be registered for the course(s) until all the steps outlined there have been completed.
Check Information
If you enter the "Check Number" the order will be finalized. If you wish to leave the order in "Pending Check" status, leave this information blank.
Name on Check
Check Number

Related Settings:

In the [Shopping Cart Settings page](), you can find the settings related to granting users access to their video content before you receive the check. If you'd like to allow your users to watch content answer their certificate requirements but not receive their certificate until the payment has been sent in, please check this setting as shown below.



Please reach out if you have any questions; we'll gladly assist.

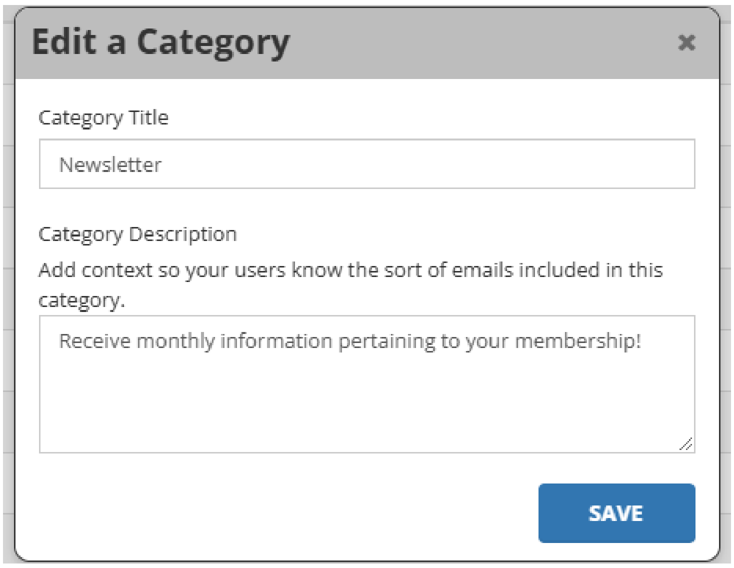
Email Marketing Unsubscribe Updates

Unsubscribing

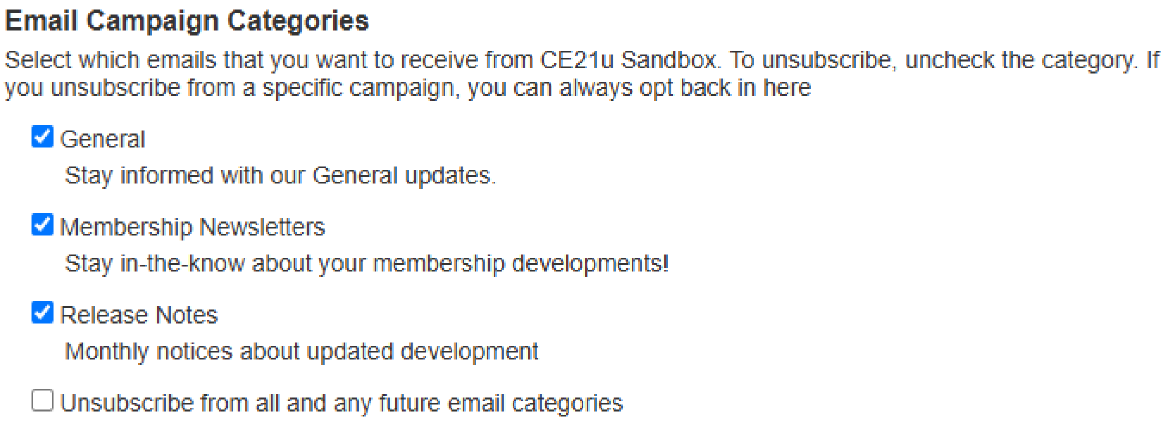
Now, when your email recipients click on the Unsubscribe link in an email you send, the system will review the category of the email where the user clicked and ONLY unsubscribe them from that category. They will be taken to a simple page showing only that category and a link to review the rest of their subscription settings, which they may wish to edit.

Adding Descriptions to Your Email Categories

To limit your users accidentally unsubscribing from a category you know they really want, you can add a description to the Email Category.



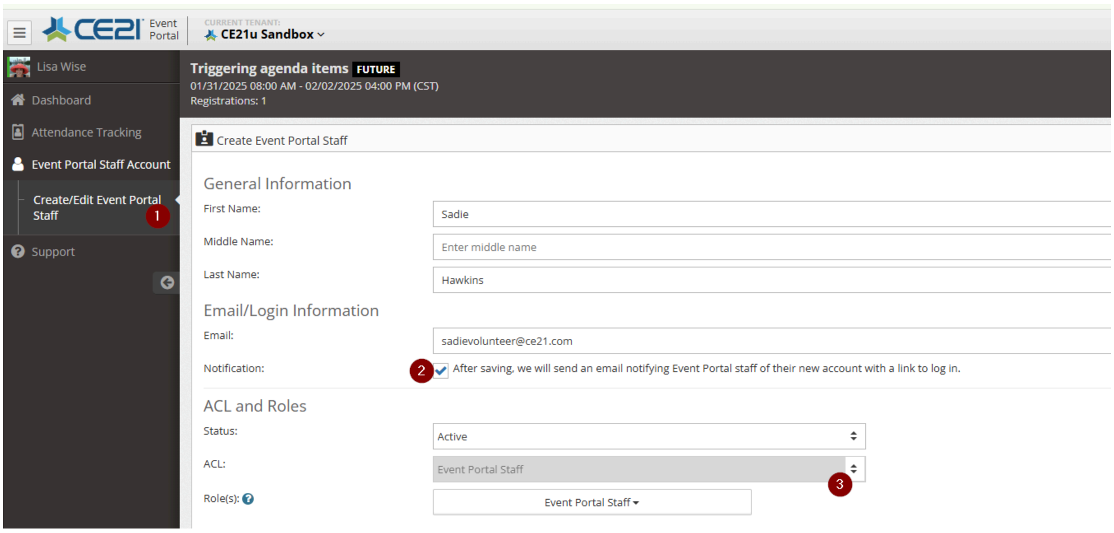
This will appear on the settings page, where users edit their settings to make informed decisions about what they choose to receive. If you're using our Email Marketing tools, please be sure to set those up! See below for an example of how that appears in the page.



Event Portal - Creating Volunteer Event Staff

To make it easier for you to manage non-staff volunteers who may only be showing up to help with your event, we've created an "Event Portal Staff" option.

In the Event Portal, once you've selected an event, you can create a new Event Portal Staff account (1), which will only grant that user access to the Event Portal, rather than anything in the Manager in general. You can even send them an email specifically granting them access to the Event Portal (2). That email template can be edited here. This is just building from our existing Access Control List (3) and you can edit all of the rights to Event Portal Staff in the usual area where you edit those roles. You can also review and edit all of these Event Portal Staff in your regular staff management area in Manager.



To learn more about the Live Event Portal, review our User Guide.

Continue for the rest of the release notes.

New Features and Updates for the (25.01) 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 an issue where the speaker bio was not reflected on the catalog's product detail page when updated using the speaker tools in the product.
- Fixed an issue with speaker bios being wiped out when a phone number was added.

ABA Integration

- We now move users to the proper program in the ABACLE system when they are swapped into a different program using the tools in CE21.

Catalog Appearance

- Updated Multi-Choice/Multi-Answer fields (used in Question Sets, Customer Settings, and Company Settings) to only show the search bar at 11 options, not 6.
- Updated our recent Google Places address validator feature to better handle addresses with a second address line, such as a suite.

Companies

- When using Manager, adding a new employee to a company now defaults to marking them as a “Current Employee." This setting applies unless you modify their Employee Status during the addition or editing process. This operates differently than in the Catalog, where Company Settings might limit Current Employee status automation unless accepted by the Company Admin. We have not changed how adding an employee works in the catalog; we only made it easier for you to mark the employee as “current” immediately.

Directory

- The Directory now handles clustered members who share an address, such as an office building. Each member is now shown in a scrolling list.
- We have fixed the missing filters in the Directory search page on mobile view.

Email Marketing

- Fixed an issue where the Email Sender Display name used the universal template display name instead of the specific one assigned to the email campaign.

- When the recipient clicks on the {UnsubscribeLink} in your email, it will now simply unsubscribe them from that one category of the email they clicked from. Then, if they want to make further changes, they can follow a link to their full settings page.
- Email Categories now include an option to add a description. This allows you to explain to your email recipients the kinds of emails they will receive in each category.
- We also have cleared up the settings on the Notification Settings tab in a user's account in the catalog to match the page they access when they click the Unsubscribe link. The wording has been updated to make it much easier for your users to understand what they subscribe to.
- If you save an email campaign, we will keep you on the same page rather than redirect you to the campaign search page. We will also show you if you have unsaved changes next to the Save button.
- We made some updates to prevent large jobs of 100k+ emails from getting stuck in processing.
- If you have scheduled an email to go out on repeating dates, you can edit the campaign between your send dates.
- On the Campaign search page, we have added more clarity for the information shown there by listing the Smart List in use by the campaign, showing how many successful deliveries have been sent on multi-dated campaigns, with multiple dates by showing how many have been sent.

Interactivity

- If a forum has not been started yet in a product's viewer, we will show the text "Create a new post to get the discussion started" so users can start the conversation.
- In the chat room, we have updated how our scroll handles a user reading from the past when the chatroom is very active. It will no longer scroll away from them while people add new chats.

Live Events

- Event Portal: You can now repeatedly check users in and out of an agenda item or the overall event, and the time tracking will work automatically. This allows you to scan people out and back in for breaks or if a registrant needs to step out for an emergency.
- Event Portal: You can now easily add volunteer staff to help scan your users directly within the Event Portal. See highlights for more information.
- You can now print a roster of your users from the Live Event's Information tab, where you can find your current registrants. This roster can include the name, email, company, signature line, and a checkbox. You can sort alphabetically by first or last name and print in landscape or portrait mode. Currently, the Agenda rosters only include users who have paid for the Agenda item, but we will update that to include all registrants in a future release. Until then, you can print out multiple overall event rosters and keep one in each room as a backup.
- Badges: There is now a way to delete a specific Registrant-type badge.

Marketing

- Fixed the issue where deleting carts in the Marketing > Cart Notifications area wasn't deleting all selected carts.

Memberships

- Fixed the issue that led to duplicate membership invoices being processed for some members
- Fixed the issue of being unable to select child memberships on a mobile device browser.
- Fixed the issue with {GroupTitle} token not working in some email templates when sent using the Email Members tool.

Products

- Classrooms and Virtual Summits: The {Launch}, {Handout}, and {Certificate} tokens that enable you to create your own schedule page with HTML were not visible for Video Replays. This issue has been resolved.
- Auto-Completions: CE21 will now execute a job every ten minutes across all product types, identifying users who have fulfilled their certification requirements but have not yet retrieved their certificates. This ensures the accurate and timely attribution of the completion date and time.
- Registration: The Quick Launch registration feature, which allows you to bypass the shopping cart for free items, can now be used with a Price Adjustment, even if there is a Registrant Type or Agenda Registration form.
- Virtual Summit Analytics: Map view now shows state lines in the USA and gives the state name after the city when you hover over the details. We have also improved our data gathering for Samsung and other Android devices and browsers.

Reports

- Group Invoicing Report:
  a) We now offer more details on refunded invoices, featuring a row for each transaction that includes the invoice creation date, payment date, and refund date.
  b) Numbers are now rounded to two decimal places instead of four.
  c) The Invoice Status now only shows as either Open or Closed.
  d) The Paid Date has been changed to Activity Date, reflecting that not all entries in this report pertain to payments; it now includes creation, refund, void dates, etc.
- The Viewer Analytics Report now provides improved device tracking. The report page loads more quickly, the information is in a larger font, additional details are available in a table below the pie chart, and the print feature outputs the information in a larger format.

Sales

- Bundle: The count column on the Bundle search page in Manager now correctly displays how many times the bundle has been utilized.
- Bundle: Fixed the issue where On Demands showed their date on the bundle detail page.
- Bundle Type 5 (Build your own bundle): We resolved the issue of allowing users to add an item to both the shopping cart and their build-your-own bundle, leading to multiple orders for the same product.
- Bundle Type 5 (Build your own bundle): The "Add to bundle" button was absent in Search 2.0, but this issue has been resolved.
- Bundle: Fixed issue affecting Bundle type 1 using Video Replays.
- Check orders: We have removed the unnecessary second step for Pending Check payments. Now a check order is either Pending Check or Check-Paid rather than an interim step where they fax or email you a copy of the check. Please see the highlights for more details.
- We have removed the Shopping cart setting for the "Virtual Terminal" payment option. Instead, the Paid Offline option will just include a non-required field where you can add the Transaction ID, if you have it. This information will then remain with the order and show up in sales-based reports.

Smart List

- There is now an audit log to see who has changed the parameters, etc. You can also use the dropdown tool to revert to a former version of the Smart List.
- When you save a Smart List, it keeps you in the Parameters tab instead of taking you to the results.
- The "Acceptance Checkbox" Customer Custom field is now searchable in the conditions.

- We have added a Group Recurring payment type, which allows you to search for users who are auto or manual payers.
- We have reordered the fields to display in a more consistent order with how they show in the settings area.