RELEASE 25.02

CE21 UPDATES + RELEASE NOTES

New Features and Updates for the (25.02) 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.

Companies

- Updated the logic in Manager and Catalog to automatically remove the Company Admin ACL when an employee is marked as a Former Employee. Additionally, the Company Portal now retains the checkbox selection during Bulk Operations.

Directory

- Enhanced the functionality of the **Back to Directory** link on the Directory Details page to facilitate navigation. Now, when users return to the directory, their previous search filters stay applied.
- Updated the Edit Company Directory page to ensure that the Company Type and Number of Employees fields only display in the Custom Data Search widgets when they are added.

Donations

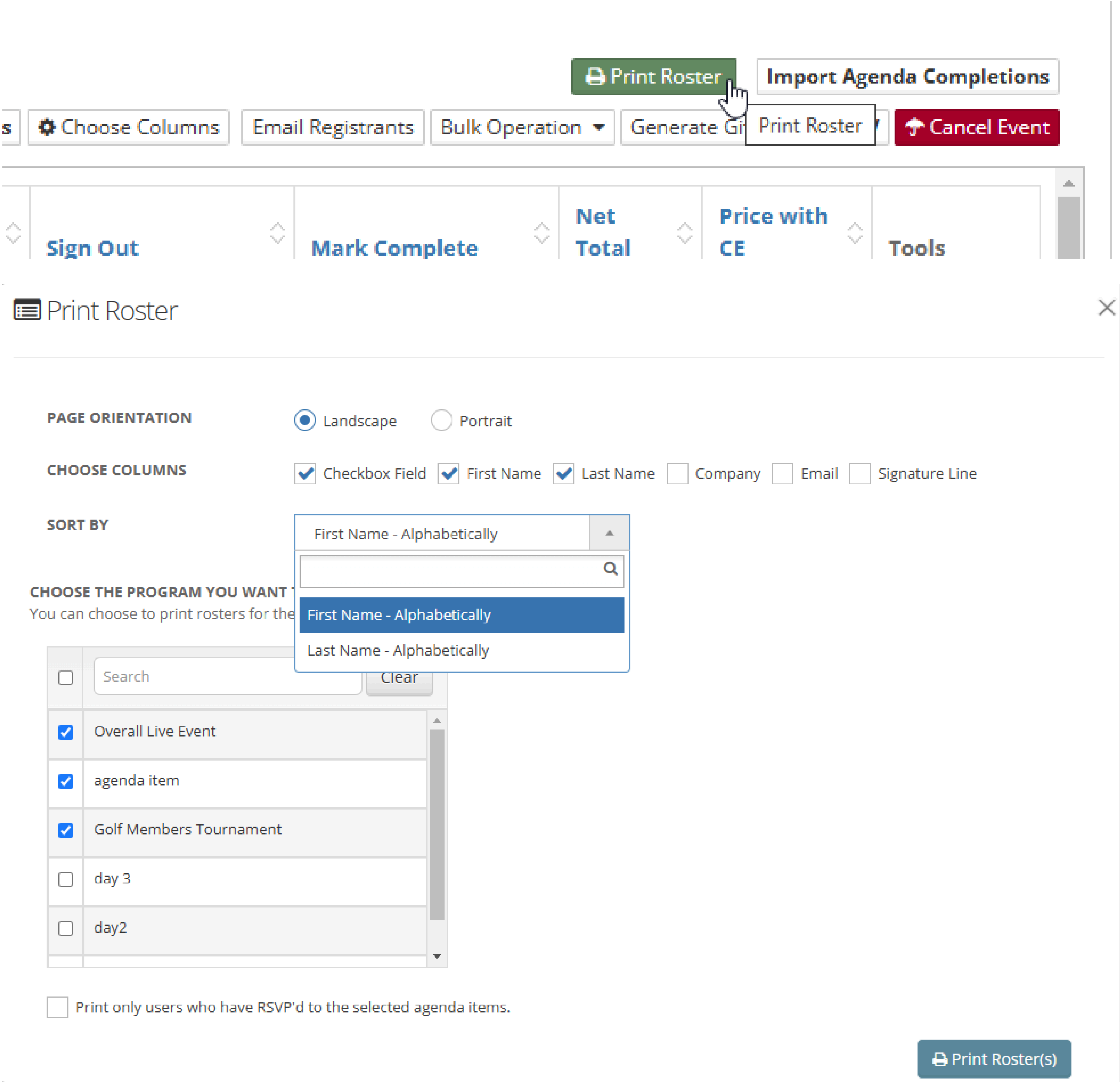
- Updated donation processing in Manager now enables staff to **process backend orders for donations that utilize an additional processor**. The "Impersonate & Complete Donation" button has been replaced with "Add to backend order system," ensuring that donations are correctly routed through the appropriate processor based on the assigned GL code. Once in the backend order system, the carts can only process this donation invoice.

Email Marketing

- We updated the email marketing report to accurately track **unsubscribes** by only counting users who clicked the unsubscribe link within a specific email campaign. Previously unsubscribed users will no longer appear in the report, which prevents confusion about when and why users unsubscribed.
- Enhanced the **Reports within the Email Marketing** tools to offer more accurate insights into campaign audiences, unsubscribed users, and multiple send dates. The report now specifies Smart List audience size, category exclusions, and recipients per send date while considering unsubscribe timing and resend rules. Additionally, tooltips clarify recipient calculations, and layout improvements enhance navigation intuitively.
- We have also added **new message tokens** for each specific customer account tab.
- Resolved a problem where past times were mistakenly disabled when rescheduling an email campaign for a future date.

Live Event

- Using the green "Print Roster" button found above your live event's current registrant list, you can now **print a roster with customer details, checkboxes, and signature lines**. These are now available for you to print out for every level of your live events (overall and at the agenda level).



- In the **Event Portal**, we have fixed the results shown when complete and incomplete smart filters are shown.
- The hyperlinked, editable times have been removed from the registrant list. This change was made to support the addition of multiple check-in/out times for agenda items (only available in the Event Portal) and the overall Live Event (available for all events). Now, only the first check-in and the last check-out times are displayed to avoid confusion that may arise from multiple time entries.
- View the **new attendance log within the user's account in Manager** – In the certificate pop-up within a user's account for the overall event, you can now view, edit times, check-in, and check-out

users more quickly. All changes will be recorded in our audit log, now available within the Event Portal and the user's account in the Manager. If time tracking is required on the overall live event, the completion percentage is now also shown in the certificate pop-up.

Manager

- **Google Places and USPS (+4 Zip Code) lookup are now automatically enabled** for all of our clients whenever your users add an address to our system. The Address Settings page has been removed and is now integrated as a default feature. Newly added addresses will now be verified when entered within the Manager or the Catalog, reducing incorrect address data for your users.
- **The Manager version of the address input has been updated to match the Catalog experience**. The Venues section is excluded from this change because it has a different and more comprehensive address search functionality.
- We've improved the **Catalog Alerts** setup by adding a "Select All" option for product selection when "Product Details" is chosen in Alert Location. Additionally, we've included hover-over tooltips for the Start and End Date fields to clarify that the dates will be applied according to the catalog's specified time zone for the current tenant (when you manage multiple tenants).

Memberships

- We have moved **Membership Alerts** to the Group Communications tab!
- In the **Communication tab, all settings now auto-save** when you click awayand a "Saved!" message appears to the right of the label. This message will display for all updated settings, except Membership Alerts, Payment Reminder Rules, and Renewal Reminder Rules, which utilize a pop-up tool for saving.
- We have improved the Membership alert setup process to ensure payment preferences are appropriately selected. By default, "All" payment preferences are now pre-selected.
- When you reject membership and enter your message, the **rejection message is now added to the customer's notes**.
- We’ve resolved an issue where users could not add child groups from their current membership on mobile devices.
- We've resolved an issue where invoices were automatically created when importing members into child groups. This change applies to all group types to prevent unintended invoices during the onboarding process.
- Fixed an issue where the Renewal Policy did not automatically apply a discount as it should.

Notifications

- Resolved the issue of multiple email reminders being sent, which was caused by spikes in bot traffic that have also been addressed.

Products

- **We've improved the product's edit page in Manager** to visually indicate whether a product is Published or Unpublished by using color and text for greater clarity on status. Products that are not yet published or are no longer published will now be labeled "Unpublished" in an orange/yellow color.
- Rephrased and rearranged the **Edit Email Rules options for Virtual Summits and Classrooms** to enhance clarity. The default selection has been updated to "Send a reminder based on the earliest start date in the overall program schedule." Bold text enhancements were implemented for

improved readability, and the (?) help icon was removed since the revised wording now offers clearer guidance.

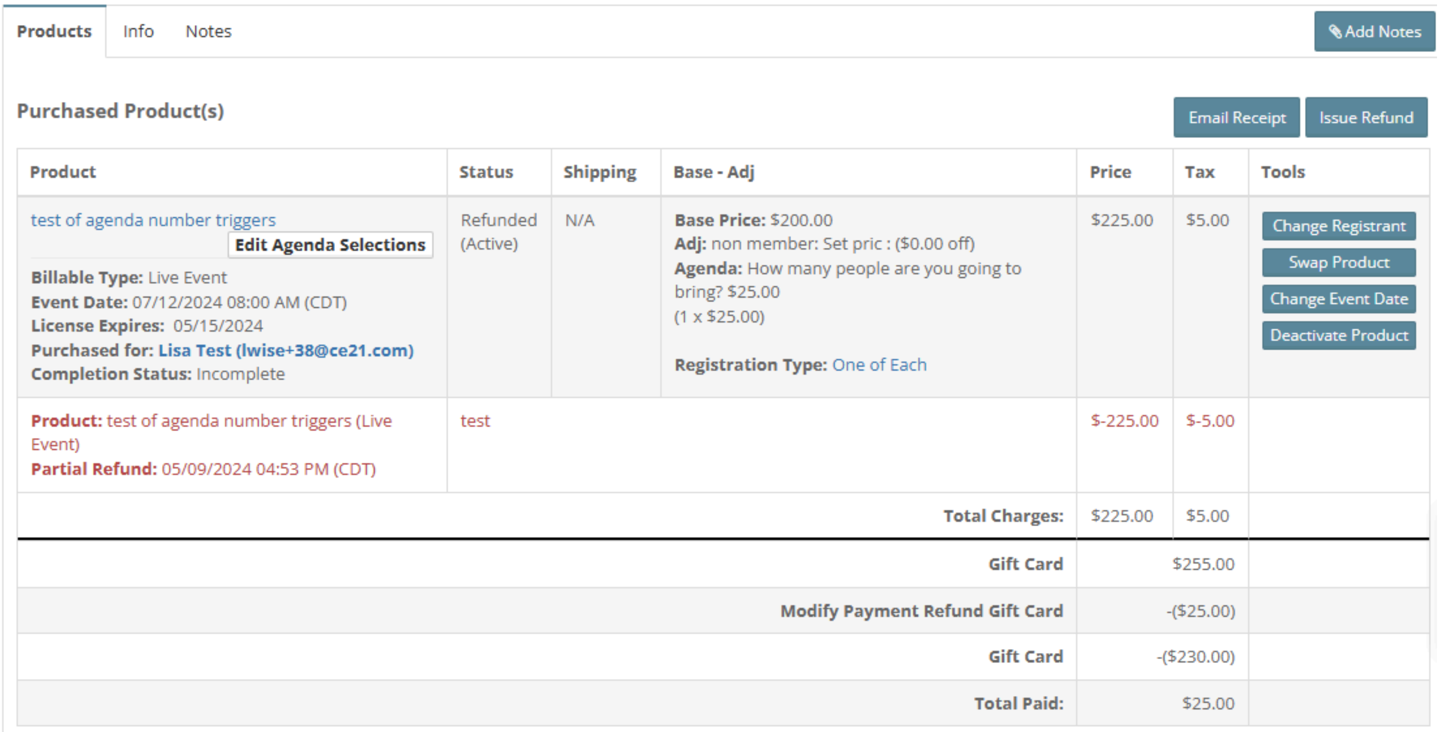
- **ABACLE Integration**: We removed the ABA warning message and ABA Completion certificate requirement for all product types, except for Webinar, Webcast, Live Event, On Demand, and Video Replays where these features remain active.
- Updated the **More Dates dropdown in the catalog** to display the product type labels on products within the same product family. Live Events will show the venue, instead, if available.
- Resolved timeout issue when uploading multiple dates to a video replay distributed to many tenants.

Reports

- **Email Communications Report:** We no longer include email records where users email themselves certificates. We also fixed a discrepancy with the recipient count.

Sales

Several improvements have been made to the **order detail page in the Manager** to enhance clarity. Here is an example of many of the updates listed below.

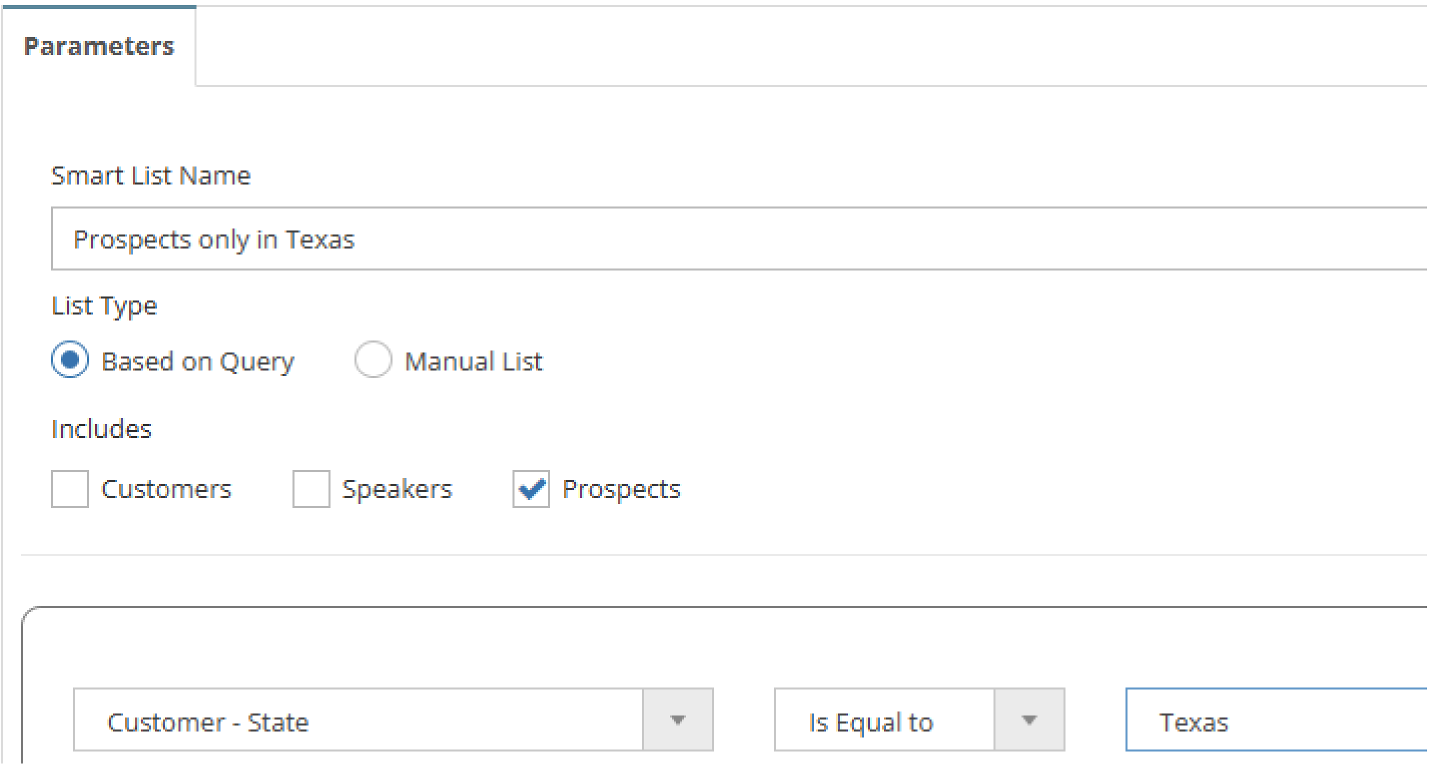


- The row beneath Total Charges has been darkened for better visibility.
- Price and tax payment amounts are now presented in a single right-aligned cell.
- "Total Deposited" has been changed to "Total Paid."
- The billable type (Product type, Donation, Gift Card, Fee Plan, Group Type) is now displayed in bold within the details of the product information so you have more information about what exactly was purchased.
- Now, Donations, Group Purchases, and Fee Plan purchases will show as clickable links, leading to their respective edit pages (as it does currently for product orders)
- When switching between products, the product type is now displayed in parentheses in the order history table.
- Refund transactions have been added to the order table as a row, displaying below 'Total Charges'.

- Payments are now shown as positive values, while refunds are displayed as negative values in parentheses (e.g., ($5.00)).
- This update standardizes the display of payments and refunds, making the order details more transparent and consistent.
- Chargebacks are distinctly labeled as "Chargeback" next to credit card information. New chargeback rows have been included in the order details table, similar to how refund rows are displayed.
- **Bundle Updates**:
  - The Bundle Usage History table now correctly shows the bundle discount.
  - Build your own bundle (Bundle Type 5): We now prevent users from adding the same item to both the cart and a bundle, ensuring they cannot bypass duplicate restrictions. If users try to add duplicates, they will receive a notification.
  - Resolved issues with bundle discounts to ensure correct application to eligible products.
- When you **swap a product with a registrant-type question set or agenda items**, we will retain and display previous selections, where applicable, when moving to the same product. Staff can review and adjust responses before saving.
- Agenda items stay editable after refunds if the product remains active in the user's account.
- Fixed the issue where offline donations were appearing as $0

Smart List

- **You can now create Smart Lists filtered by Customers, Speakers, and Prospects.** A new section has been added with checkboxes for each account type, and you will choose which type of user should be pulled on the smart list. The smart list will return only the selected account types based on your input. All existing Smart Lists will maintain the historical setting of Customers and Speakers. If you need a refresher on Prospects, please visit [this article].



- Fixed some Account Tag Parameters (contains, starts with) on smart lists that weren't returning the correct results.