RELEASE 25.03

CE21 UPDATES + RELEASE NOTES

New Features and Updates for the (25.03) 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

- The **E-commerce Errors tab in a user's account in Manager** now shows all types of E-commerce errors, including Failed Recurring Payments. This offers a more comprehensive view of and quicker access to payment issues related to membership or donation payments.

Catalog Appearance

- If users cannot create an account on CE21 (usually due to a Single Sign-On setup), we have clarified that account creation on the catalog is not allowed. These updates clarify account creation restrictions, ensuring that users understand system limitations before proceeding.
  - In Catalog Settings, a new, editable **Site Message has been added**: "Cannot create an account on CE21 message." The default message reads: "No account found. Accounts cannot be created on this site. Please use an existing account to proceed."
  - **Shopping Cart: When assigning a user not already in the CE21 database**, the "No account found" error message now reflects the updated site message.
  - **Shopping Cart – Assign Later Functionality**: Users can also assign additional registrations later. If they select this option and account creation on CE21 is not allowed, we will notify them before payment to prevent surprise about not being able to create an account later.
  - **Catalog – Assign Products Tab**: When the purchaser assigns users, we will display the site message if they try to add a product to a user not in the CE21 database.
- We updated the **Order Tables in the catalog** for improved clarity, including changing misleading blue text to black, adding a Product Type label, and fixing receipt button styling. We also refined receipt and email formatting, updated terminology, and simplified payment displays.
- We updated the **Search page for better mobile and tablet views**, including moving filters out of the hamburger menu for easier access to refine searches.
- Fixed an issue in **Search 2.0** that was showing past dates on published Video Replays.

Certificates

- If you use our **Certificate Versioning** tools, we updated the Certificate Search page to always show all certificate versions, including the Certificate's Version Count and Current Active Date, for better clarity. Enhanced navigation directs users to the current active version and displays a red banner warning when inactive certificates are viewed.

Classified Ads

- We have added an **audit log to the Price Adjustments area on Fee Plans** to track actions in that area.

Companies

- We fixed an issue in which new employees did not receive the correct company-based membership price adjustment when registering for a product.

Directory

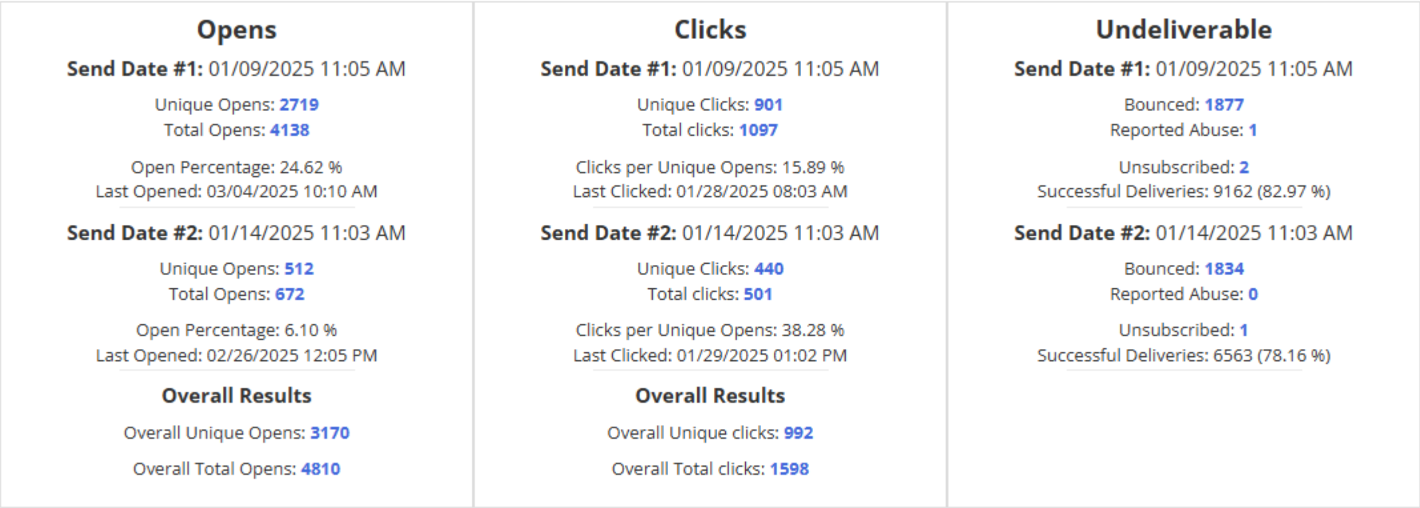
- **Company Directories**:
  - Fixed the issue with some hidden fields showing incorrectly in the Company Directory.
  - These directories now include a map feature like the Individual Directory.
- **Individual Directories**:
  - Fixed issue where hidden fields were still showing in the Directory.
  - Improved map directions by showing the address instead of map coordinates.

Donations

- Improved the **New Order functionality in Manager by adding an "Add Donation" button**, which enables staff to add donations directly to a customer's account. Donations made using an additional processor must be processed through the secondary processor, with all other "Add" buttons disabled unless they utilize the same processor. Additionally, Registrant Details are omitted when adding a donation.
- **Donation Payment Enhancements**
  We've improved the handling of failed donation payments and enhanced pledge management in Manager and Catalog. These updates provide a more straightforward, more efficient donation management experience for both donors and staff:
  - **Automatic Payment Profile Removal**: If a donation payment fails after the set retry limit, the system will remove the payment profile and switch the donor to manual payments.
  - **Better Auto-Renewal Handling**: Donations will only auto-renew if all outstanding pledges are paid, preventing excessive unpaid pledges from accumulating.
  - **Improved Pledge Management**:
    - Donors can now select and pay multiple pledges at once using the Pay Multiple button.
    - A new Skip this Pledge option allows donors to cancel individual pledges (if enabled).
    - Updated terminology: *Pending Payments → Pending Pledges, Payment Due Date → Pledge Due Date.*
- **Process Payment for Autopayers:** The Process Payment functionality has been reinstated for autopayers to allow direct payments without using the shopping cart. This allows you to charge the card on file instantly.

Email Marketing

- We no longer send emails 15 minutes before their scheduled send date.
- **Updated Email Marketing Reports**
  We have made many changes to the Email Marketing reports found within the Campaign. The middle part of the page now has the following updates.



- **Future Send Dates in Multi-Date Campaigns**: For campaigns with multiple send dates, the report now shows all future send dates and rules, displaying recipient counts as "Unknown - Future Send Date" for unsent items. This clarifies the expected send schedule for ongoing campaigns.
- **Report Layout Improvements:**
  - The report layout has been simplified by moving data into three primary cells: **Opens, Clicks, and Undeliverables.**
- **Opens Section:**
  - **Unique Opens** and **Total Opens** counts now link to the specific email delivery report, showing data for the selected send date.
  - **Open Percentage** is a new metric showing the percentage of unique opens relative to all recipients.
  - For campaigns with multiple send dates, additional statistics, such as **Overall Unique Opens** and **Overall Total Opens**, have been introduced to reflect totals across all send dates.
  - **Last Opened Date** is now prominently displayed and shows for each date of multiple-date campaigns.
- **Clicks Section**:
  - Similar improvements were made to the **Clicks** section, with separate statistics for **Unique Clicks** and **Total Clicks**.
  - These counts are also linked to the respective report for each delivery date.
  - **Overall Unique Clicks** and **Overall Total Clicks** reflect totals across all campaign send dates.
  - Last Clicked Date is now prominently displayed and shows for each date of multiple-date campaigns.
- **Undeliverable Section**:
  - New layout for **Bounced, Reported Abuse,** and **Unsubscribed** data with separate counts for each send date.
  - Clicking on these metrics will take users to the corresponding filtered report for more detailed insights.
  - **Successful Deliveries** is now displayed as a number with the percentage in parentheses (e.g., "Successful deliveries: 198 (99%)").
- **Future Plans:** We plan to update the report below this area in our next sprint, which will allow you to see all data in one report. Then we plan to build you a Clicks report with that singular focus so you can track how well each link is doing within your email.

Live Event

- For tenants with Political Districting enabled, we have added **Legislative Tokens to Badge Templates and the Badge Tab** within products. For better organization, a new "Legislative Tokens" section has been included in the token list.

- To prevent billing surprises, we now display a **warning modal when adding a Live Event to a Classroom or Virtual Summit**. This warning indicates that, according to your contract, the event will be billed as a digital product as part of the Classroom or Virtual Summit. This warning appears before you add the event to the schedule and when you review the product in the schedule. While it's perfectly fine to add these products, we want to ensure your staff is aware of the billing implications.
- We have removed the "Allow registrants to view the archive for credit" setting for all Live Event product types, as Live Events are not designed for video-based credit requirements. Users can still earn credit through evaluations, affidavits, and more. Additionally, any archived video linked to a Live Event will now have the option to be fast-forwarded.
- When you close an agenda item without saving, we've improved the unsaved changes alert with a clearer confirmation modal:
  - Save and Proceed: Saves changes and continues.
  - Continue Editing: Remains on the item.
  - Leave Anyway: Exits without saving. This update prevents data loss and enhances clarity.

Event Portal Updates

- **Event Portal Setting**: The "Enable Event Portal" setting works in product templates. Creating a live event from an Event Portal-enabled template automatically selects the setting. If a product becomes a template, the setting is copied.
- **Agenda Item Credit Display:** The Adjust Credit tool now correctly displays agenda items with total credit but no individual credit. Any changes made to the Total Credits are now recorded in the audit log.
- **Event Dashboard Widget**: The **Catalog Link** button is now the first button in the Event widget, with the glyphicon **glyphicon-share** added before the link text. The **Enter Attendance Tracker** button now replaces the catalog link, directing users to the Attendance Tracker page.
- **Mobile and Desktop Button Layout**: Button layout adjustments have been made to ensure proper spacing and fit on tablets and desktops.
- **"No Check-in Time" Pop-up Update**: The buttons in the "Warning! No check-in Time" pop-up have been swapped and colored accordingly. The Check-Out button is now green and labeled "Check-Out Anyway," while the Cancel button is grey.
- **Fixed** issue where unpublished events incorrectly showed zero registrants instead of actual registrant count.
- **Restored** the duplicate scan banner—scanner now halts repeated scans until switching to a different registrant or changing modes.
- **Resolved** "Check Out All" error on Overall/Live Event Attendance and Agenda Attendance pages.
- **Maintained** scroll position when clicking a user (no more jumping to the top)

Memberships

- An **audit log has been added to the Groups Communications tab** in Manager to track changes made to email reminders, settings, and staff notification updates.
- The **{LapsedTimer} and {SuspendedTimer}** tokens are now available in Membership Payment Reminders, Membership Invoice Emails, Early Renewal Notifications, and Group Renewal Reminders.
- **Enhancements to Failed Payment Handling & Autopay Processing**
  We've made improvements to streamline failed payments and invoice processing for autopayers of Memberships/Groups. These updates simplify payment retries, reduce confusion, and improve the user experience for both members and staff.:

- ○ **Automatic Payment Profile Removal**: If a payment fails after the failure retry limit you have set up, the system will remove the payment profile and revert the member to manual payments. This provides more explicit payment handling and prevents unexpected charges from past-due invoices.
- ○ **New "Process Payment" Button**: Now available in Manager and Catalog for group invoices, allowing autopayers to pay invoices directly—bypassing the shopping cart.

Mobile App

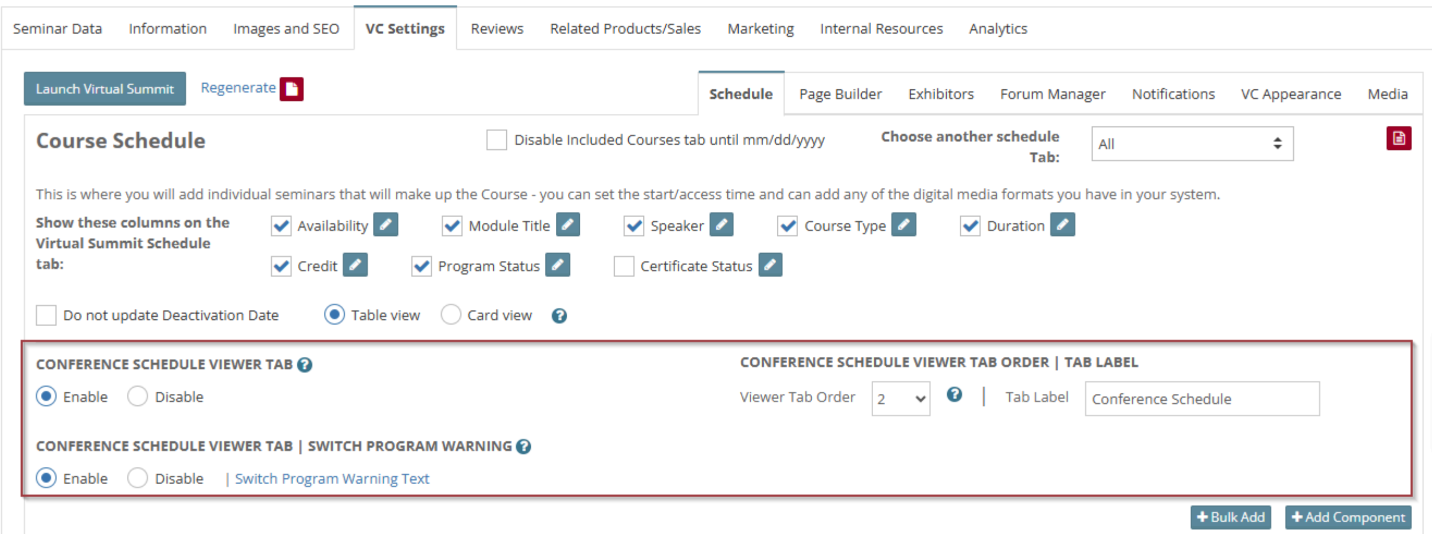
- We received reports of some CE21 mobile crashes, addressed those issues, and released the **updated app in the app marketplaces.**

Notifications

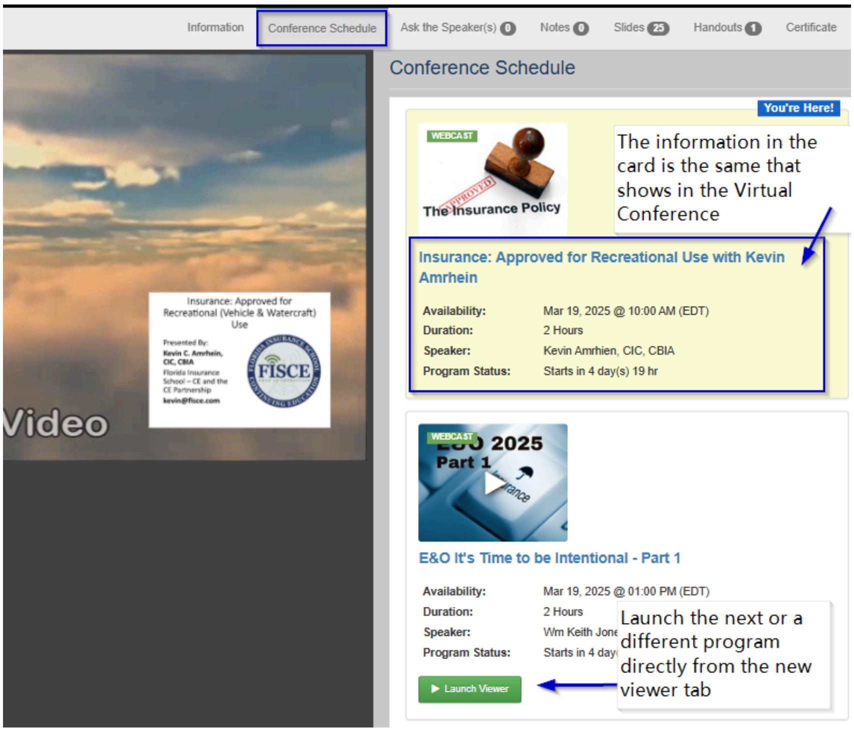
- Fixed an issue where the {CustomerAccountLink} message token wasn't displaying correctly in email reminders sent through the Registrant Table > Email Registrants or as an email reminder.
- Fixed an issue where the global footer appeared in test emails despite the "Do not use global footer" setting being enabled. Test emails will now follow the same global header and footer settings as regular emails.

Products

- Fixed issue where Price Adjustment expiration was showing despite setting to the contrary.
- **New Virtual Conference feature found in Classrooms and Virtual Summits**
  - ○ We have introduced a new "Conference Schedule Viewer Tab" within to improve user navigation. When enabled, this tab displays all programs within the same schedule tab, allowing users to easily access their next session without needing to switch back to the Classroom or Summit. The Conference Schedule Viewer tab’s order and label are fully customizable, and a warning modal is included when switching programs, with editable content for the header, text body, and button label.



  - ○ The Conference Schedule Tab, when enabled, displays the course schedule in a card view with a single-column display. It highlights the current program at the top of the list of programs with a “You’re Here!” badge and differentiates previously launched programs with gray and the most recently launched program in yellow, as we do in the course list on the Classroom or Summit. A transition mechanism ensures that launching a webinar from the program viewer closes the previous program's viewer to prevent audio overlap, keeping the portal accessible in the background.



- Resolved an issue where not all reviews from items added to the classroom module were showing. Now, all reviews will display correctly on the front end when the "include reviews from items added to classroom module" setting is enabled.

Sales

- Enhanced the registration process to allow **users to register for others when a product has a Registrant Type question**, providing options to either request the information from the user via email or fill it out directly, with the ability to edit selections in the cart even after requesting info.
- Revised the order processing logic to stop modifications to a user's company name when a company name field is added in the **Company Check** section at checkout. Any existing company in their account will be used to populate this field, but updates to their company details won’t be made based on this entry, as it could be specific to individual orders. This ensures that Company memberships, directories, tax exemptions, and company admissions remain intact.
- Updated the order item swapping functionality to accurately calculate taxes based on the final price of the swapped-in item. This ensures precise tax reporting in the Product Sales Report and reflects proper adjustments in the order history for both higher and lower-priced item swaps. The tax report has been revised to include product names.
- We have updated our Check Acknowledgment email to include the {OrderList} as it appears in an order confirmation, along with the correct balance due at the time it is sent.
- We’ve improved the Catalog checkout process to enable non-members to purchase products for a member when modifying the registration in the shopping cart. While you could always do this with additional registrants, you couldn't update the first registration in the cart. If the registrant's email changes from a non-member purchaser to a member, the system will notify the purchaser if they're eligible for a better rate, ensuring the correct pricing is applied, similar to the enhancements made for bundled purchases.

Sharing Marketplace

- We enhanced the **"Share In" / "Update Share"** modal by improving its layout and readability. It now fits vertically with a maximum width of 1200px for a cleaner, more user-friendly experience. Key changes include clearer text, streamlined pricing with a dollar sign field, and removing placeholder text. The "Set Publish Date/Time" and "Unpublish Seminar" fields use a consistent format for improved usability.
- We’ve improved the marketplace UI/UX for better readability, consistency, and usability. Changes include adjustments in font sizes, button order, and alignment, plus enhancements to product information displays and program dates. The "View in Catalog" button, modal functionality for course descriptions, and content separation in the stats section are also refined for a streamlined user experience.

Smart List

- Resolved the issue where clicking "Results" on the Marketing Customer Smart List failed due to a quotation mark in the Customer field.
- The "Is Not Checked" operator in the Accept Question field now correctly returns users who have never checked the box and those who have unchecked it.

Viewer/Presenter

We changed our video player last year, and during that process, we had to remove some less essential features while focusing on incorporating and refining all the necessary elements. **This release includes all those items restored to our viewer,** such as:

- The playback speed function has been reinstated in the video.js player using its native option, with "Normal" speed set as the default at 1x. This is only shown in scenarios where it is allowed to show, such as after course completion upon review or when no time tracking is required.
- The new version of Video.js fixes the problem with the video thumbnail demo functionality. In this version, the product image transformed into a video player but played test clouds instead of the demo video.
- The volume and mute settings now persist across all video segments in the program viewer, including test videos, preseminar media, seminar media, and both looping and non-looping media.
- We added a feature to the video player that shows the current resolution following to the "Auto" setting (e.g., "Auto (720p)") to help users see the quality of the video they are viewing and improve troubleshooting.
- We've reinstated the ability for users to pause and unpause videos in the CE21 Program Viewer with the space bar, similar to YouTube's functionality. This feature is available for on-demand content and the archives of webcasts, video replays, and webinars, as long as the video player is focused, except for text fields where the space bar is still used for typing. This update enhances accessibility, particularly for screen reader users.