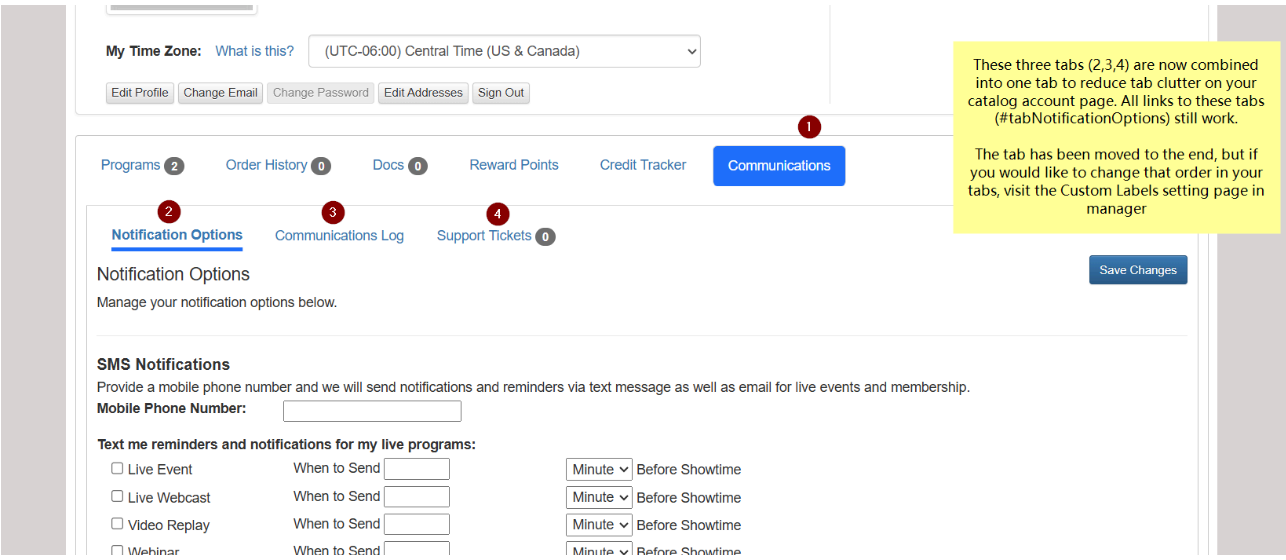
New Features and Updates for the (25.04) Release

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.

Catalog Appearance

- To declutter users' account pages, we have revamped the layout by adding a **new parent tab labeled "Communications. "** This tab features three organized subtabs: Notification Options, Communications Log, and Support Tickets. In this section, users can edit their notification settings, view all emails sent from CE21, and check any tech support tickets.
    - Existing anchor links for these pages (such as #tabNotificationOptions) will continue to function in emails you send or any linking you do from your website.
    - This tab is now at the end of all tabs in the user's account, but it can be moved to any location you'd like using the grabber tool on the [Custom Label Settings page](), under the My Account page tab.



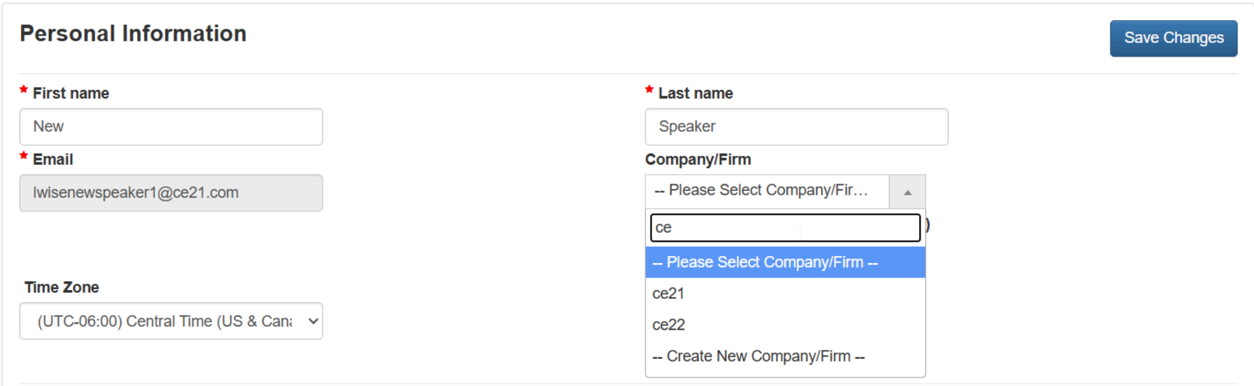
- **Catalog Layout Menu Widget:** There is a menu widget you can add to your sidebar or main content area in your catalog, but some of the newer pages were not available for use. We have now added "Place Ad," "View Ads," and "Referral Service" pages to the Custom Menu Widget.
- We fixed an issue preventing lazy loading on the search page. Now, all products load dynamically as you scroll, ensuring the complete list is visible.
- Corrected a typo on the webcast and live product pages across all catalogs—now accurately states: "Expires x day(s) after program date."

Classified Ads

- Customers who initially purchased a fee plan at the base rate or non-member rate and later become members will now see a **"Better Price Alert"** with a Change Price option in the shopping cart when they renew, which enables them to switch to the member rate.

Companies

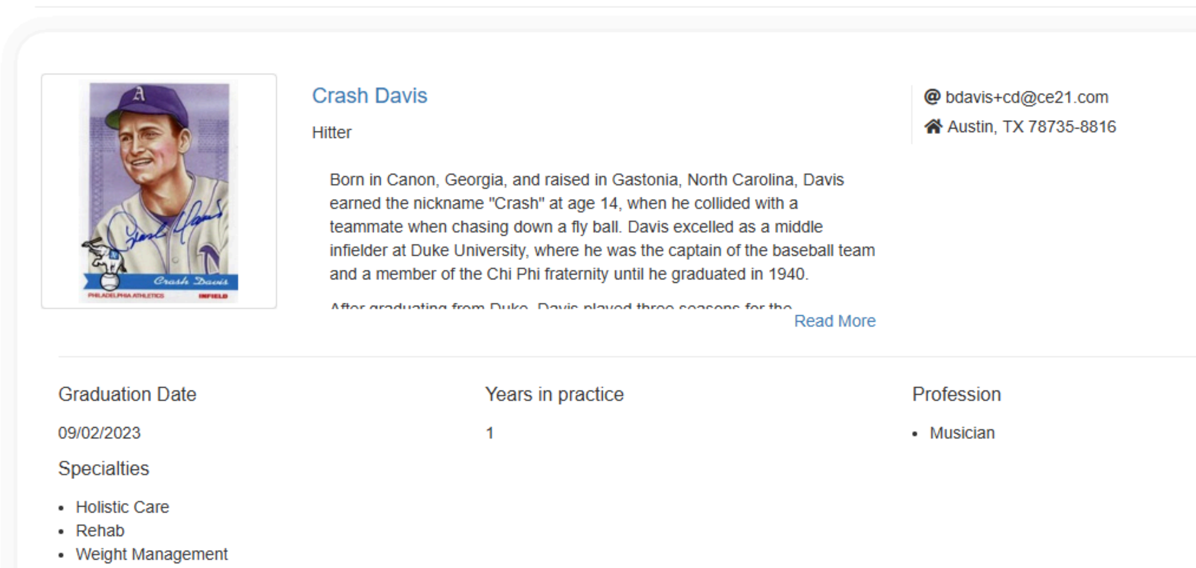
- If you are using the **"Catalog Setting: Use Enhanced Company Search/List"** found in the [Company Settings page](), we have fixed the search field so that it now auto-focuses—placing the cursor in the search box by default—making it faster and easier to find a company when creating or editing an account. This Company Search list is excellent for preventing duplicate companies from being created. If the user's company is not found in the list, they can create one using the "Create New" option.



- Resolved an issue that prevented staff from adding employees to company groups when the "Do not allow customers to create accounts" setting was enabled. Now, existing employees can be successfully added to groups even with this setting active.

Directory

- You can now display **Customer or Company Custom Data** on both the search results page and the detail page. The directory cards are designed for readability on all devices.



  - Custom Data displays in the specified order from Directory Settings.

- Custom Data is presented in a responsive layout that modifies according to the visibility of the bio.

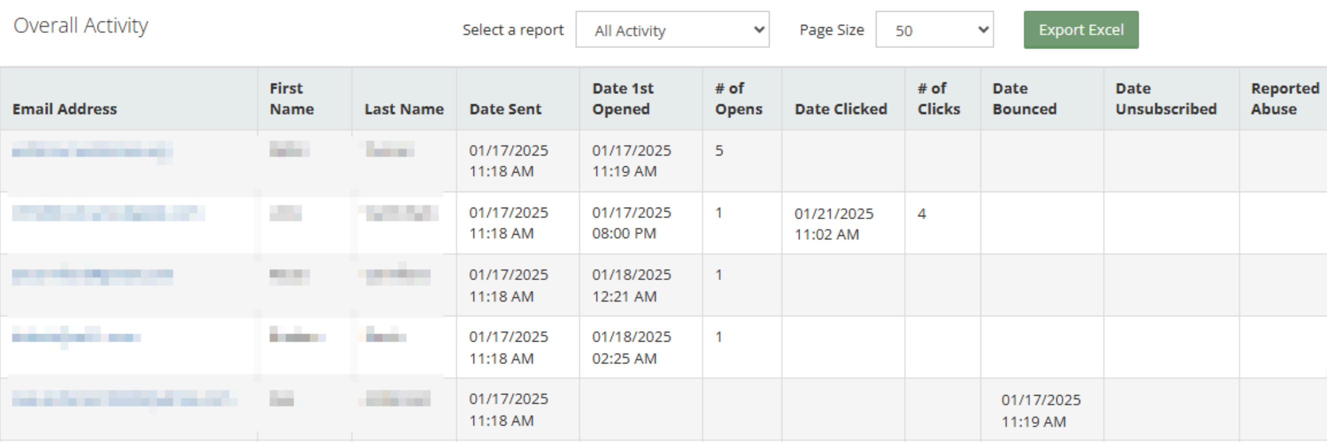
- **Group Directory Tab**: Since relocating your Directories setup, we have revised the tab in groups for better clarity. Informational text has been added to guide you in adding groups to directories. You will find a link in that tab directing you to the appropriate section for setting up the directory.

Donations

- Resolved an issue with duplicate donation reminders being sent.

Email Marketing

- **Email Marketing Report Updates**: We have updated the report available at the bottom of the page when you visit a Campaign that has been sent.
  - The report dropdown now includes an **"All Activity"** option, which provides a comprehensive view of all engagement metrics (opens, clicks, bounces, etc.) in a single report.

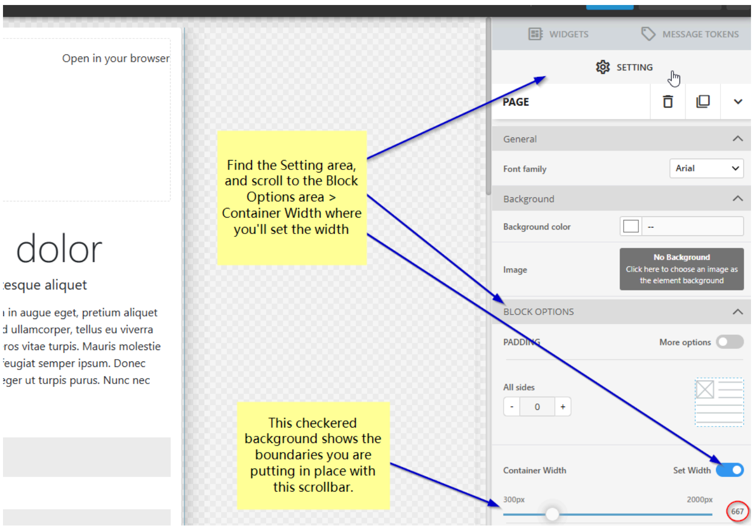


Overall Activity   Select a report: All Activity   Page Size: 50   Export Excel

Email Address	First Name	Last Name	Date Sent	Date 1st Opened	# of Opens	Date Clicked	# of Clicks	Date Bounced	Date Unsubscribed	Reported Abuse
[illegible]	[illegible]	[illegible]	01/17/2025 11:18 AM	01/17/2025 11:19 AM	5					
[illegible]	[illegible]	[illegible]	01/17/2025 11:18 AM	01/17/2025 08:00 PM	1	01/21/2025 11:02 AM	4			
[illegible]	[illegible]	[illegible]	01/17/2025 11:18 AM	01/18/2025 12:21 AM	1					
[illegible]	[illegible]	[illegible]	01/17/2025 11:18 AM	01/18/2025 02:25 AM	1					
[illegible]	[illegible]	[illegible]	01/17/2025 11:18 AM					01/17/2025 11:19 AM		

  - When you export the data, **multiple dates will be separated into individual tabs.**
  - KNOWN ISSUE: We have identified a discrepancy in the data from our email delivery service. The All Activity report sometimes shows click dates without open dates due to third-party data issues. We will resolve this in our May release, which will provide more accurate reports, resulting in improved open rates.

- **Set Email Marketing Container Width:** We have introduced new functionality that allows users to set a fixed width for email marketing campaigns. This option can be configured in the settings, similar to the current image width setting. The default width remains the whole viewport, but you can now specify a set width (e.g., 900px) if you prefer to keep their emails narrow.



- **Campaigns List Sorting**: The date sorting for the campaigns list has been updated to show the most recent campaigns at the top, making it easier to locate the latest communications.
- **Fixed slow loading** on Email Marketing campaigns page by loading Sent and Opened columns separately after other data, improving load times and preventing timeouts.

Live Event

- **One-Page Agenda Registration Form** – We have introduced a new setting that lets you display agenda registration as a single-page form instead of being paginated by day, which reduces clicks and enhances the user experience. Existing programs will remain unchanged, while new programs will default to the one-page format. You can switch at any time using the checkbox located in the Live Event Settings Tab on the product.
- **Event Portal Attendee Search**: We resolved an issue where searching for attendees by name caused incorrect or disappeared search results. The search now only searches when the "Enter" key is pressed or when you click outside the search box. This was necessary to ensure consistent search results.

Manager

- Revamped the **Upcoming Programs widget** across Manager (if you manage multiple accounts) and Dashboard levels (for all accounts), featuring enhanced filtering options, a cleaner UI, CE21-specific indicators, and improved functionality, including server and encoding profile filters, registration status, and a redesigned search experience.
- Customer and Company Settings - You can now **edit the display settings for multiple fields in the Customers or Companies Settings simultaneously.** Simply select the fields you want to modify from the table, then click on Bulk Edit to apply the changes to all selected fields at once.

Memberships

- **Invoice Email Template Selection**: We have added a dropdown menu for staff to select from the five available Membership Invoice Email Templates when emailing invoices or statements.
- Updated the **group renewal process** to reduce confusion and provide a smoother experience for you and your members.
    - Active Members: Only active members are eligible for auto-renewal.
    - Members in statuses Lapsed, Suspended, Membership Cancelled, and Membership Ended are excluded from auto-renewal.
    - If a lapsed member pays their outstanding balance after the renewal date, they will be auto-renewed with a "Pending Payment" status, and their renewal dates will align with the previous period.
    - Pending Approval or Required Information Missing: If a member is in either of these statuses at renewal time, their membership will not auto-renew and will need to be manually renewed after the necessary approval or information is provided.
    - We fixed an issue where the Required Information Missing alert appeared even after a question set was answered, making it seem that the Request Information button was not working.
    - Renewal Buttons: A "Renew Now" button is displayed for members in "Required Information Missing" status, allowing manual renewal once the question set is answered.
    - Fixed an issue where members could wind up renewing their membership several years into the future if their renewal required answering a question set and/or staff approval.
- **Child Groups**: The parent group line ($0.00) is now hidden in the shopping cart when a child group is added during an active membership period.

- Fixed an issue where the **"Undo Membership Change"** button on the Company Details page did not function.
- Corrected **"Member Since"** date in the Members Tab in a Group and on Smart Lists. The date now matches across all reports and relevant sections.
- Fixed an issue where payment status was not updating upon membership reactivation by enhancing the code to automatically sync payment status, removing the manual step.

Products

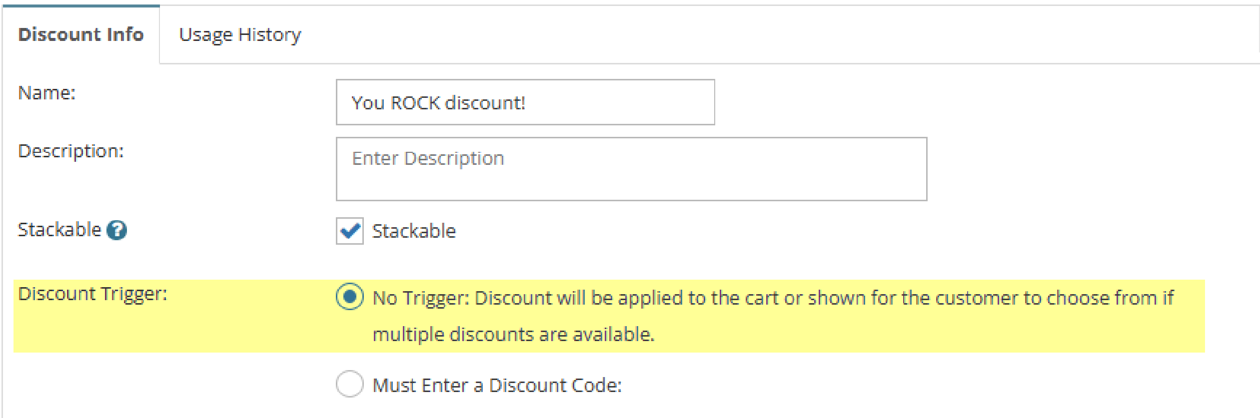
- The problem with unselectable **add-ons after registration** has been resolved. If configured, add-ons are now available for selection after purchase.
- In **Virtual Summits**:
    - The Page Builder and Exhibitor elements have been updated to alphabetically order the dropdown options.
    - Several elements have been relabeled for clarity, including "Countdown Timer" (formerly "Countdown Timer Element"), "Exhibitors" (formerly "Exhibitor"), "HTML/Text" (formerly "Html Element"), "Overall Credit, Certificate, Handouts" (formerly "Overall Element"), and "Uploaded Video" (formerly "Embedded Video").
    - The initial modals for adding or editing elements in the virtual summit's Page Builder and Exhibitor Page Builder have been resized for better visibility.
- **Credit Distribution:** If a producer tenant is mapped for distribution, credit updates flow downstream. If there is no prior relationship for that credit type, visit the distribution page to establish one. Changes at the producer won't affect manually adjusted downstream products. Alerts will notify you about credit updates, clarifying whether changes have been distributed or if you need to share them on the distribution page.
- **Custom Attributes will now be automatically distributed** to downstream tenants during product distribution.

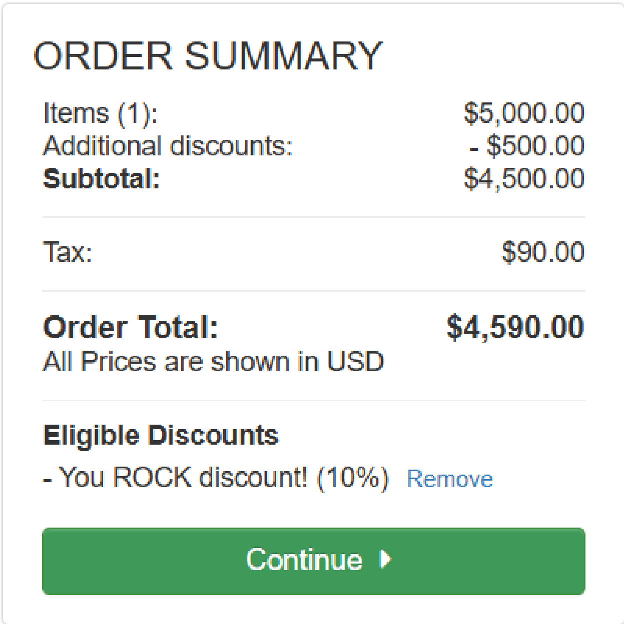
Reports

- We fixed a bug in the Product Sales Report's **Export Excel button that prevented** it from responding when filtering only by Event Date. You can now successfully export the report using Event Date filters.
- Several updates and typo fixes have been applied to reports to improve consistency and clarity:
    - **Product Details Report**: Updated pop-up messaging, modified field names, and standardized text formatting.
    - **Evaluation Summary Report**: Adjusted column names for clarity, including renaming "Product Name" to "Product Title" and "Product Title" to "Product Type."
    - **Registration Report**: Field text updated for clarity on customer search.
    - **Product Sales Report:** Payment method names typo fixed for "PayPal" and "Pay Later".

Sales

- Automatic discounts are now truly applied automatically in the shopping cart! When you set up a **No Trigger style discount**, that discount will automatically apply to the user's cart during checkout without requiring any action from them.





  - **If multiple discounts are available, customers can still choose between them.** Because of this automatic nature and some recent errors in setting up discounts, we will now warn you when saving if you've configured a No Trigger discount to be accessible without restrictions for a product or individual.
- To avoid confusion and errors related to deleted discounts, you will **no longer be able to delete a discount** that has been used in any order. If you try to delete it, you will be prompted to enter an expiration date instead to make the discount inactive. A pop-up message will appear when attempting to delete such a discount, with the option to enter an expiration date to allow you to do this from the Discount search page in Manager.
- When **editing a discount**, clicking save now keeps you on the Discount page, allowing you to continue making edits.
- When creating a **new order in Manager**, you will now see a column that displays the Price Adjustment if it applies to the order. Additionally, if you edit the price of a bundle in the cart in Manager, we will remove the products from the bundle and assign each of them the price amounts you specified manually. This change will provide clearer information when reviewing reports or orders in the future.

Smart List

- Fixed issue causing the Smart List columns to not save as you moved around the Smart List.