RELEASE 25.05

CE21 UPDATES + RELEASE NOTES

New Features and Updates for the (25.05) Release

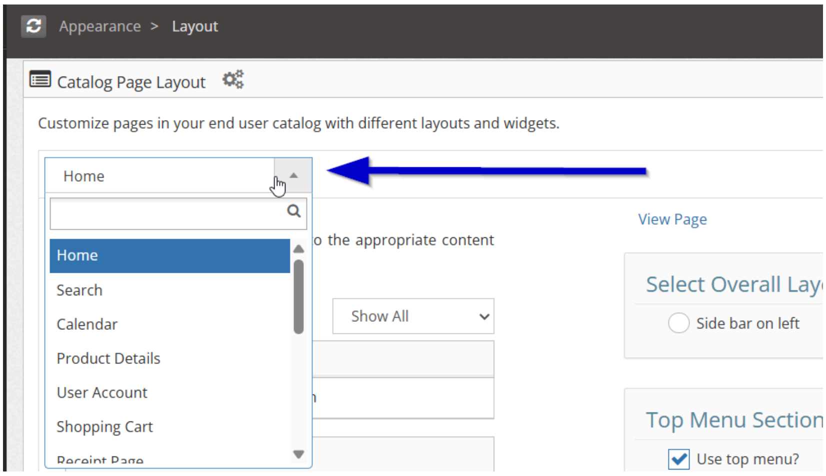
If you have any questions about this release's features or functionality, please submit your comment or question via the Help Bucket in the Manager, and a CE21 Team Member will contact you.

Accounts

- Data collection of **required fields using guestbook links for existing users has been enhanced**. Now, when existing users access a guestbook link, they will only be prompted to fill in missing information from their profile. This ensures that records are complete without affecting previously submitted data. Required fields have been updated to reflect this change.
- When two user accounts are merged, any **completed forms will now be retained and correctly linked to the merged user's profile**, ensuring no submission data is lost in the process.
- We've fixed an issue where the Save Changes button on the Personal Information page was sometimes unresponsive.

Catalog Appearance

- Within the Catalog Appearance > Layout area as well as Custom pages, you will now find all pages behind a **searchable dropdown instead of tabs.**



- The **Cancelled Programs smart filter on the My List tab now correctly displays all of a customer's cancelled programs by default**, without pre-filling the Start Date. It also appears at the end of the smart filter list and still shows only if the customer has one or more cancelled programs.
- We've **improved account page speed** in the catalog for users with many courses by optimizing database calls, caching, and skipping unnecessary checks for faster load times and a smoother experience.
- We've **enhanced catalog navigation** for a cleaner experience across devices to offer a more intuitive and visually appealing menu navigation experience on both desktop and mobile.

- The main menu height is increased for better spacing, with icons and text vertically centered.
- Icons like Home, Sign In, and Compare are uniformly 20px, while the Cart icon is slightly larger at 22px for emphasis.
- Light vertical separators divide key menu sections clearly.
- The search field showcases a modern design with the placeholder “Search Catalog” and allows Enter to search. It also aligns with other icons for a neat look.
- The Compare and Cart icons display red badges when items are selected.
- Dropdown arrows are closer to their menu items, and all items are aligned for a balanced layout that expands on ultrawide screens.
- On mobile, the Log Out button is hidden in minimized view, and the Cart icon remains smaller but consistent with desktop styling, while the Home icon is left-justified next to the hamburger menu.

Classified Ads

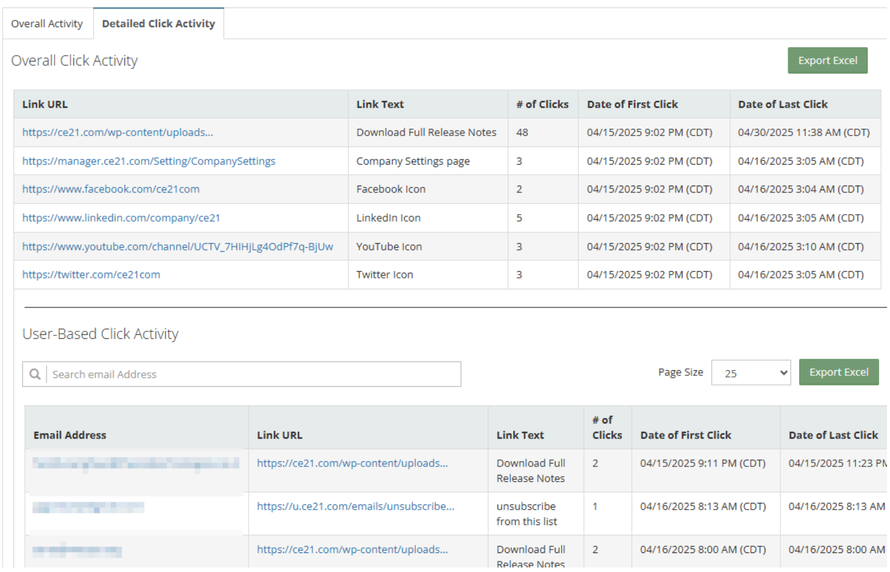
- Introduced a new Classified Ads feature for the CE21 WordPress Plugin. You can now **showcase your complete Classified Ads widget on any WordPress page using a shortcode.** The widget features a title, description, Place Ad button, search options, sorting, filtering, and a list of ads.
- **Navigation arrows on the Catalog Image Carousel and Classified Ads are now fully visible at all times**—no more dimming or hover needed—making navigation easier for users when there are more than 5 images.
- Fixed issue where backend orders using the Classified fee plan failed to load into the shopping cart.

Donations

- You can now **upload and manage images for donations**, including SEO fields for meta keywords, descriptions, and a “Do not index” option. Uploaded images replace the default in the catalog, displaying left-aligned with padding and resized to 200px width while maintaining aspect ratio.
- You can now **configure the Donations Marketing Page layout via the Catalog Appearance page**. The fixed widget for that page includes the option to sort active donations with drag-and-drop and choose image display options (current, default, or none) with helpful info bubbles.

Email Marketing

- **New Email Campaign Report to show detailed Click information.**


Overall Activity | Detailed Click Activity

Overall Click Activity

Export Excel

Link URL	Link Text	# of Clicks	Date of First Click	Date of Last Click
https://ce21.com/wp-content/uploads...	Download Full Release Notes	48	04/15/2025 9:02 PM (CDT)	04/30/2025 11:38 AM (CDT)
https://manager.ce21.com/Setting/CompanySettings	Company Settings page	3	04/15/2025 9:02 PM (CDT)	04/16/2025 3:05 AM (CDT)
https://www.facebook.com/ce21com	Facebook Icon	2	04/15/2025 9:02 PM (CDT)	04/16/2025 3:04 AM (CDT)
https://www.linkedin.com/company/ce21	LinkedIn Icon	5	04/15/2025 9:02 PM (CDT)	04/16/2025 3:05 AM (CDT)
https://www.youtube.com/channel/UCTV_7HIHjLg4OdPf7q-BjUw	YouTube Icon	3	04/15/2025 9:02 PM (CDT)	04/16/2025 3:10 AM (CDT)
https://twitter.com/ce21com	Twitter Icon	3	04/15/2025 9:02 PM (CDT)	04/16/2025 3:05 AM (CDT)

User-Based Click Activity

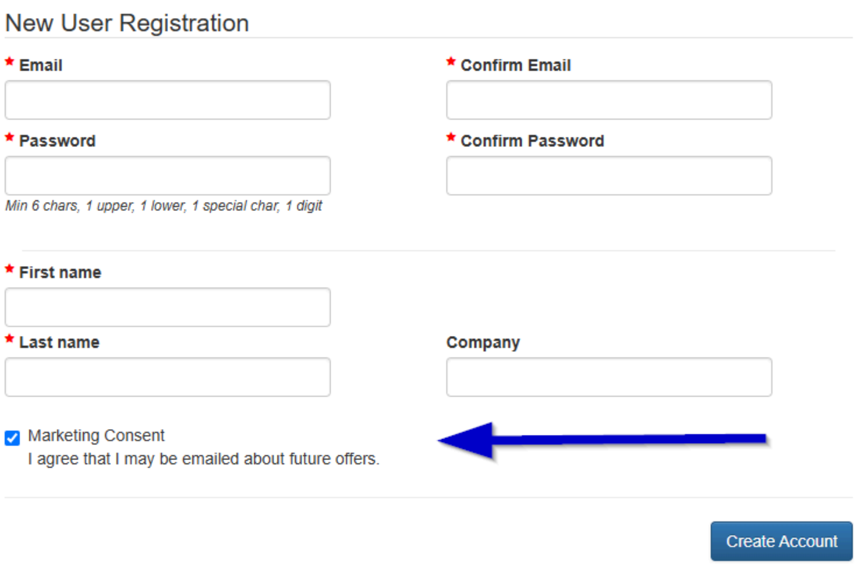
Search email Address

Page Size 25

Export Excel

Email Address	Link URL	Link Text	# of Clicks	Date of First Click	Date of Last Click
[redacted]	https://ce21.com/wp-content/uploads...	Download Full Release Notes	2	04/15/2025 9:11 PM (CDT)	04/15/2025 11:23 PM
[redacted]	https://u.ce21.com/emails/unsubscribe...	unsubscribe from this list	1	04/16/2025 8:13 AM (CDT)	04/16/2025 8:13 AM
[redacted]	https://ce21.com/wp-content/uploads...	Download Full Release Notes	2	04/16/2025 8:00 AM (CDT)	04/16/2025 8:00 AM

    - We’ve launched the new **Detailed Click Activity** section to provide tenants with more actionable insight into how users interact with email campaigns.
        - New Tab: "Detailed Click Activity": A dedicated space has been added next to Overall Activity Reports. It contains two reports to show overall and user-based click information.
    - **Overall Click Report:** Lists all links used in a campaign and their performance.
        - Links display hyperlinked URLs with truncation for long or user-specific links (e.g., unsubscribe links).
        - Link Text column: If multiple sources (e.g., multiple images/text blocks) use the same URL, all associated source names (e.g., "Image 1, Image 2") now appear, separated by commas.
        - First Click / Last Click Dates include time zone info and are formatted for export.
        - All links show, even if they have 0 clicks.
        - No impersonation clicks are counted.
    - **User-Based Click Report:** Shows click activity at the individual user level.
        - Search bar to filter by user or email domain.
        - Only clicked links are displayed.
        - Email addresses link directly to user accounts in Manager.
        - Click tracking now includes activity via the Catalog-side Communications tab, excluding impersonation clicks.
- We’ve made several **updates to improve the accuracy and clarity of email campaign reports**:
    - Deleted users now appear as “Name (deleted)” with their email.
    - If a user clicked a link but there’s no open data, we now infer they opened and set the open date to match the click date.
    - We’ve removed the confusing click percentage and now simply display the “Number of people who clicked” which is a unique count of the people who clicked on any link in your email — making reports easier to understand.
    - Additionally, we’ve optimized large report exports to prevent timeout errors and improve reliability.
- **The Marketing Consent field is now fully incorporated into the account creation and profile editing pages, provided the Email Marketing module is activated.**



    - When this module is enabled in your account, the setting appears as a profile field that users will encounter when creating a new account or updating their profile.
    - This meets the legal requirements necessary to market to your users.
    - You may edit the field and the description text in the Customer Settings table. It is a standard field.
    - New customers will have the Marketing Consent box checked by default. They can opt out and will be automatically unsubscribed from all email marketing categories.

- Existing customers who have not unsubscribed continue to remain subscribed. No settings related to their subscription have been changed on your users' accounts.
- Changes to the Marketing Consent field are tracked in the Customer Audit log on the manager side.

Forums

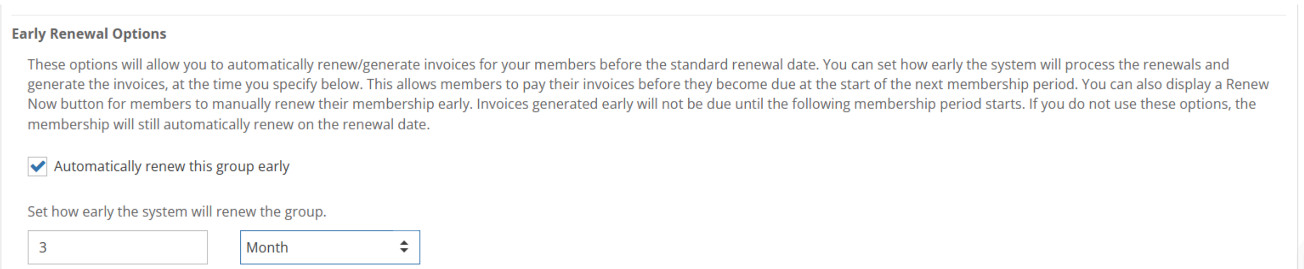
- Users can now reply to comments in Group and Product forums with an additional reply level, displayed indented. Replies are included in the total comment count and visible in the My Comments filter.

Manager

- **New CKEditor table settings improve responsive design** by defaulting tables to 100% width, removing borders and cell spacing, and adding 8px cell padding. Column widths distribute evenly as percentages for new tables. These changes apply only to newly created tables, leaving existing ones unchanged. Additionally, fixes ensure new table styles (cell spacing, padding, border) accurately apply across various areas—product descriptions, custom data, Virtual Summit headers, exhibitor booths, and classroom views—overriding conflicting CSS while maintaining existing content.
- **The Glass theme has been removed** from both the Event Portal and Manager due to multiple display issues and low user preference. Any current users of the Glass theme will be automatically switched back to the Smart Default theme.

Membership

- For those processing renewals early, **we added a new setting in the Groups' Renewal tab, 'Automatically renew this group early.**' This option lets you renew the group X days, weeks, or months before the system's renewal date. Find this setting on the Membership >Renewals tab. *For example,* a group uses a Specific Date for the membership period, Jan. 1 - Dec. 31, but wants invoices ready on Oct. 1. Check the box to enable the setting and set your time frame to 3 months. You no longer need a calendar reminder to go to Sales > Invoicing and click Renew/Generate Invoices. As long as the member is 'Active,' they will automatically renew early. This also allows 'annual' payers to receive payment notifications since their invoices will be in the system when the payment reminder triggers.



- **Membership Renewal – Child Group Management**: We've enhanced the early membership renewal process to allow editing of child groups.
  - Edit Child Groups: Select and update child groups during renewal with checkboxes showing titles and fees.
  - Automatic Fee Updates: Fees recalculate based on selected child groups.
  - UI Improvements: Better alignment of child groups and payment cycles in the catalog.
  - Change Group Modal: Updated label to "Choose Child Memberships" with checked boxes for existing memberships.

    - Note: Added child groups start next membership period with no current invoice. Removed child groups stay active until period end, with an option to undo status changes before renewal.
- **Updated Charge Fee Upon Approval logic for membership groups in Manager**: Customers can now pay before approval when the "Charge Fee Upon Approval" setting is unchecked. All invoices are generated at checkout, and payment is required immediately.
    - If the membership is rejected, the system will automatically issue a refund for credit card payments.
    - If the payment method is PO or Check, and still pending, the order is canceled. If payment was received, staff are taken to the backend order system to process the refund.
    - If an automatic refund fails, staff are directed to the backend order to complete the refund manually.
    - Updated help text clarifies behavior for both checked and unchecked settings.
- **Company Based Memberships:** A new setting to give you more control over how employees are added to company memberships. Within the group settings, the header was renamed to "Add Employees to Membership," and new checkbox options on how an employee can be added to a company have been added. You can now restrict the ability to add employees to your staff only, or your staff plus company admins. This is in addition to the existing option, which allows admins to control the employees of their company. When "Tenant Staff Only" is selected, the employee add controls in the company portal are hidden. Info bubbles explain each option. Default settings adjust based on the membership pricing model used.
- Fixed an issue preventing Customer fields containing commas from being added to the Membership Question Set. The problem was caused by commas in the question text and has now been resolved.
- **Change Group button is now enabled for members with Pending Payment status.** Changing groups will automatically void original invoices and update status accordingly.
- If membership status changes to **Lapsed**, group change is paused until invoices are paid and status returns to Active.
- If status changes to **Suspended, Canceled, Ended, or Dropped**, the group change is automatically canceled.
- **Tenant staff can now cancel, end, suspend, or drop future memberships directly via the Edit button.**
- **Confirmation message** shown when editing memberships includes dynamic status and future group name, styled in red (#a90329).
- Future group membership records are deleted upon cancellation, ending, suspension, or drop of the current membership.
- The **Keep/Cancel Invoices radio buttons require user selection with no default**; if not selected, an error message in red (#a90329) prompts action and prevents modal closure.
- Account notes automatically append "This deleted the {GroupTitle}." after membership cancellation.

Notifications

- If a user cannot receive emails due to our system suppressing them for reasons like blocking or bouncing, a **new feature in the Communication tab of Manager allows for unblocking.** Use the "Unlock" button to remove the email from the suppression list. This requires confirmation and will record a note in the user's account.
- Fixed an issue where product thumbnail images were not displaying in shopping cart reminder emails using the {ShoppingCartItems} token.
- Resolved an issue with premature membership payment failure reminder emails due to delays in processing high invoice volumes. Reminders were sent based on the scheduled time instead of

actual payments. The logic was adjusted to delay emails from 1 hour to 4–5 hours after invoice time to prevent false notifications.

- Fixed an issue where the Display Name Override set in Notifications > Email Templates was not applied when using the Send a Test Email feature.

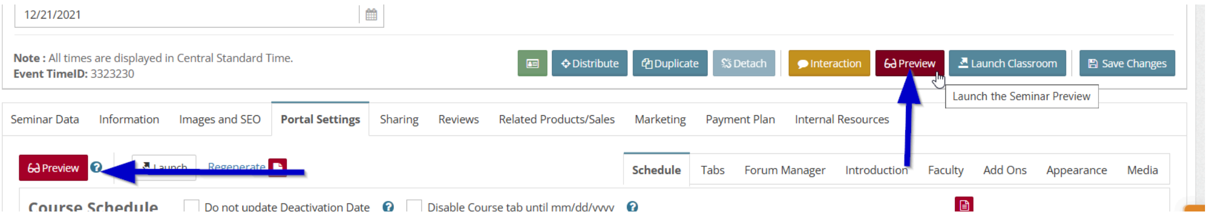
Products, General

- We have **introduced important warnings to protect against unintentional data loss when you edit your programs** by deleting Certificate Requirements on programs that users have completed. Similarly, a warning message will pop up if you delete Course Modules on Virtual Summits or Classrooms that users have completed, as well as Agenda Items in Live Events that a user has chosen for credit or for registration. These updates aim to minimize confusion and ensure accurate reporting and user records.
- **Updated the Guestbook Unpublish interface across all product types** to improve clarity and usability. The label is now "GUESTBOOK UNPUBLISH OVERRIDE" with a hover tooltip explaining it overrides the product's unpublish date/time if set.

Virtual Summits/Classrooms

- **Relabeled the "Virtual Conference" radio button in Classrooms to "Live Classroom"** to reduce confusion with the Virtual Summit product.
- **Fixed the "Return to {deliverytypelabel}" button display in mobile view** for Virtual Summit and Classroom by preventing text splitting. Also moved the button from the bottom to the top of the screen, ensuring consistent size and improved visibility across all device views.
- **Updated the Media tab in Virtual Summits and Classrooms** for better layout and clarity. The Upload and Audit buttons are now smaller and right-aligned for a cleaner look.
- Fixed a timezone display mismatch between Virtual Summit products and the Virtual Summit schedule that occurred when time zones were updated after product scheduling.
- Resolved broken Virtual Summit preview pages by changing the certificate button preview from an iframe to a pop-up window, improving loading and usability.
- **Updated the evaluation preview to display exactly as end users see it**, including speaker names and populated custom data fields, ensuring a true preview experience.
- In the Old Faithful Virtual Summit theme, fixed mobile view so that when a menu item is selected, the menu automatically collapses on page load, ensuring users see the full page content without the menu blocking the view.
- **Added an "Auto-include faculty" toggle (default off) to Virtual Summit Faculty List widgets** that, when enabled, automatically marks newly added faculty as included in programs; includes a (?) tooltip explaining this feature.
- The Forum Manager tabs for Seminars, Pages, and Exhibitors in Virtual Summit > VC Settings are now visible again for managing forum settings in bulk.
- **Introduced a new checkbox titled "Disable carousel arrow navigation"** in the Virtual Summit Carousel widget (default setting is off). This feature conceals the left and right arrows for a tidier, passive slideshow (such as for sponsor showcases). When this option is activated, the arrows will disappear from the user interface. The default carousel width has been adjusted to 75%, the default image display duration has been updated to 8 seconds (the field label has been renamed to "Image Display Time"), and the input field has been resized. The arrows now sit outside the image with added padding to prevent overlap. Furthermore, hovering over the carousel image will pause the slideshow indefinitely until the mouse pointer leaves the area.
- **Implemented the standardized Upload Image modal for adding images in Virtual Summit's Image Gallery and Carousel elements.**

- The **Notifications tab in Virtual Summit VC Settings and Classroom Portal Settings was removed** to streamline the interface and avoid confusion with the Information tab's Email Reminders widget.
- **Added a red Preview button (glasses icon) left of Launch**, also shown in Schedule tab, with a hover explaining its purpose



- **Added Mobile, Tablet, and Laptop viewport icons to the Preview viewer** for classrooms and virtual summits, allowing users to easily toggle responsive views with clear active/inactive icon styles.

- **Bulk Archive tools for Virtual Summit have been moved to the bottom.**
- Moved "Do not update Deactivate Date" and "Disable Course tab until" checkboxes with explanatory hovers.

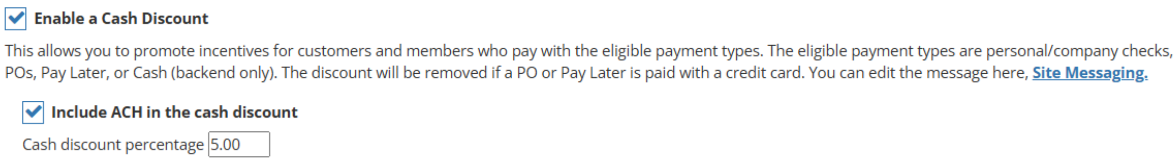
Reports

- **Group Invoicing Detail Report**: Improved invoice tracking and reporting in Manager with the following updates:
  - Added Activity Date to reflect key invoice actions (Created, Paid, Refunded, Voided, Written Off).
  - Introduced new Activity Type column and filter for better activity visibility.
  - Voided invoices now correctly display a Closed status instead of Open.
  - The Invoice Date column is now sortable.
  - Updated the Select Invoice Date Type dropdown to include Activity Date and hide Paid Date.
  - Excel exports now round amounts to two decimal places.
  - Enhanced refund logic: Full refunds now show as negative amounts with status Refund [Credit Card].
- **Added Marketing Title and Certificate Title columns** to Completion, Registration, and Product Detail reports. If only one title is used, both of these new columns will show the same title.
- Fixed inconsistency in Customer Custom Date field.

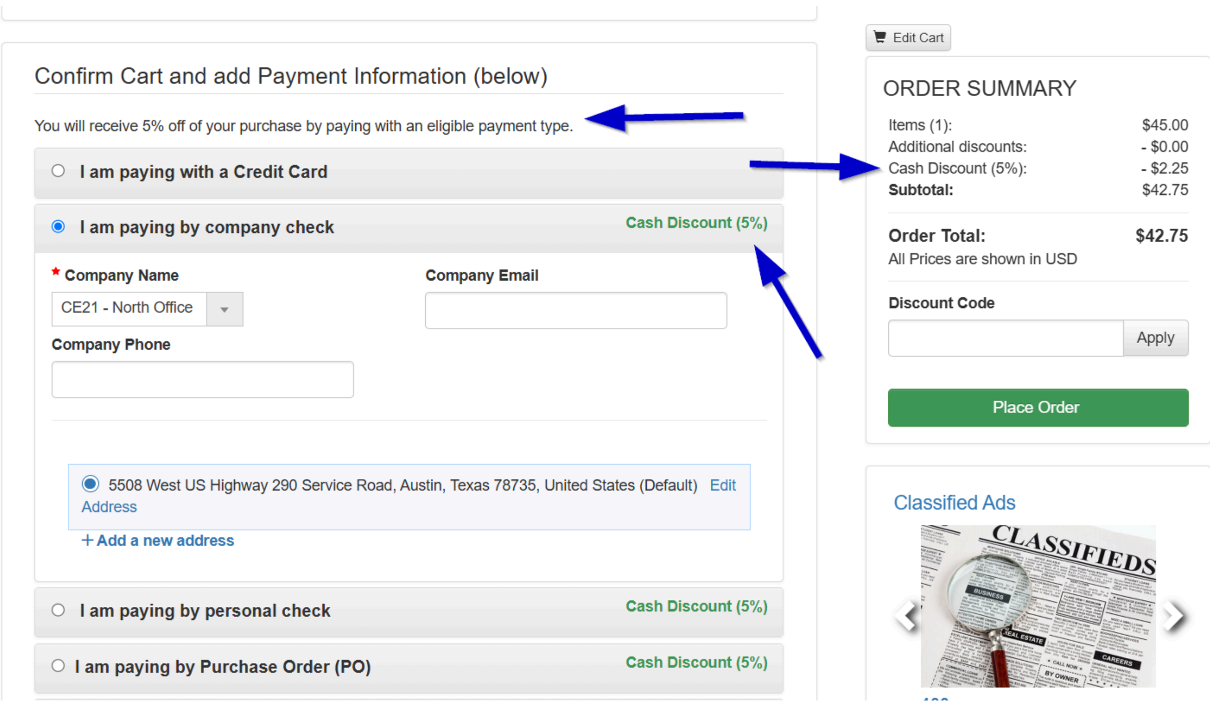
Sales

- **Cash Discount Feature Release**: You now have a way to incentivize customers to not use credit cards, which can come with hefty processing fees.

- **New Settings & Configuration**: In Ecommerce > Shopping Cart Settings, we added a Cash Discount option allowing tenants to apply a percentage discount on eligible payment methods, including checks, gift cards, purchase orders, Pay Later, cash (backend only), and optionally ACH. Staff can define the discount percentage and customize related messages and labels on the site.



- **Checkout Experience:** The cash discount percentage and customizable messages now appear in green next to eligible payment types at checkout. The "Place Order" button stays disabled until the discount calculation finishes. Users will be notified when discounts are removed for credit card payments on PO, Pay Later, or Check orders.



- **Order Processing & Business Rules:** The cash discount applies after other discounts when eligible payment methods are used. Discounts are removed and totals recalculated if the payment method changes to credit card.
- **Reporting & Manager View:** Added "Cash Discount" as a line item in order summaries, receipts, and backend views. The Product Sales Report includes a new column for cash discounts between Global Discount and Rewards Used, showing the total discount per order. Discounts are recorded as negative values when applied and positive when reversed.
- **Special Cases & Notifications:** Notifications inform users when discounts are canceled because of payment modifications. Gift card transactions are not eligible for discounts, and using gift cards for payments does not activate discounts. All messages and labels regarding the cash discount are uniformly presented in both the catalog and manager interfaces.

* **Fixed missing Sign-In/Register buttons for $0 price adjustments with Quick Register enabled.** Add to Cart now redirects to sign-in and returns users to the product page with pricing shown.
* **Improved failed payment handling for recurring payments** (Group Invoices, Donations, Classified Ads, and Payment Plans): "Requested Resource Not Found" will now retry up to 5 times before sending a failed payment notification. If a different error occurs, the notification is sent immediately. Successful retries are treated like regular payments.
* **Deprecated the Set Price option in Discounts.**

- **Price-related settings for Discounts, Bundles, and Price Adjustments are now locked after first use in a purchase to preserve transaction integrity.** Unused discounts, bundles, and price adjustments remain fully editable.
  - Bundles Type 2: All settings disabled after purchase.
  - Bundles Types 3 & 5: "Add New" and Edit for bundle ranges disabled.
  - Bundles Type 4: Existing product prices locked; new products can be added and priced once.
  - Discounts: Price settings and "Apply Discount To" options are disabled after use.
  - Price Adjustments: Popup fields are disabled after being applied in a purchase.
- **Audit logs have been added to the Discount Edit and Bundle Add/Edit pages in Manager.** All key field changes—such as names, settings, included products, discount amounts, and date ranges—are now tracked for both bundles and discounts.
- **Audit logs for GL Codes and Accounting Classes track changes to key fields** (processor, code, label, title, description, and products). Logs are accessible on individual item pages and via the Tools column on list pages for quicker review. Manual additions, removals of GL Codes on products, and changes involving additional processors are now logged.
- Fixed an issue where users who previously registered for a past session date could not register for a future session of the same product from the Groups > Product page. Registrations now process correctly and appear in the user's account.

Viewer

- The **30-second rewind and fast-forward options, along with playback speed controls, have been restored** for Staff Register registrations (TEST user). These features are available again in the viewer for internal testing.