RELEASE 25.06

CE21 UPDATES + RELEASE NOTES

New Features and Updates for the (25.06) 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

- Enhanced the **Custom Address Block** functionality by allowing the selection of individual address fields, setting a default address, and streamlining the display across the Manager, catalog, and shopping cart. Improvements include better handling of field requirements, full-width display defaults, and cleaner formatting during checkout.
- Updated **Today's Program banner** at the top of the user's Account page to show a “Pay Now” button instead of “Launch” when an order is unpaid and immediate access to the course is not allowed until the PO or check payment is received. This disables immediate access, preventing user confusion and Red X errors, while prompting the user to pay immediately so they can watch their program.

Catalog Appearance

- Improved Catalog Home page performance by optimizing the **calendar widget**, significantly reducing load times.

Classified Ads

- Fixed issues in the Classified module, including the following: discount codes for price adjustments were not applied during fee plan purchases, company purchase fee plans malfunctioned, and the "Join & Buy" feature failed for renewals.

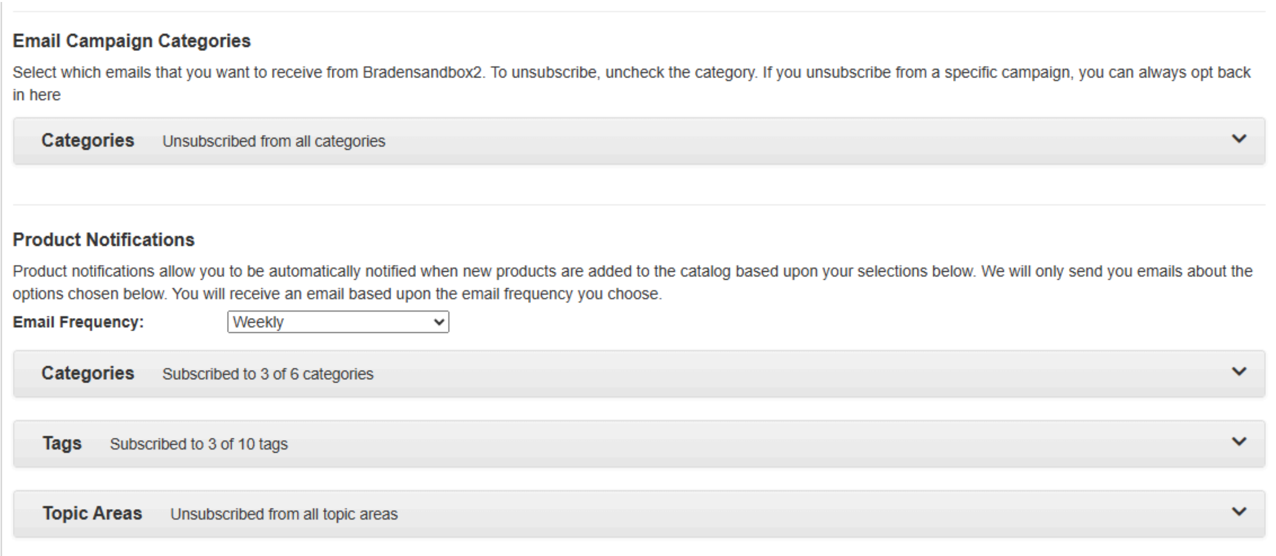
Donations

- 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

- Improved the **Notification Options** section under My Account > Communications with collapsible accordions for Email Campaigns and the Product Notifications.

    - Each section now displays in an accordion, reducing the need for page scrolling.
    - Headers show subscription count (e.g., “Subscribed to 10 of 14 categories” or “Unsubscribed from all categories”).
    - Accordions are expanded by default, but remember the user's preference. Auto-collapse if the user is unsubscribed from all in a section.
    - All fields now autosave with a visible “Saved!” confirmation on edit.



- “Upcoming” Filter & Smarter Date Search when searching for an Email Campaign
    - Scheduled and Sent have been replaced in the dropdown and now shows all campaigns with future send dates.
    - Date filters now match any future send date in a campaign, not only the first.
    - *Note:* This is a UI-only update—campaign data remains unchanged.
- The recipient count label now shows "Scheduled" instead of "Not Sent" when the date is in the future.
- The "Reported Abuse" label has been changed to "Marked as Spam" in both the report dropdown and detail card view.

Imports

- **Imported completion timestamps** now default to 12:00 PM local time instead of midnight, preventing timezone-related shifts across tenants—important for managing tenants in different time zones. This change applies to Order Imports with a Completion date, ensuring accurate cross-tenant reporting without manual time entry.
- Staff have frequently made mistakes when sending account or order emails during imports. This issue stems from a lack of visibility into the email suppression option. To resolve this issue, the system will **verify email settings** before processing imports for customers, orders, and members. If emails are activated, a warning popup will appear, prompting users to either confirm or cancel the email dispatch.
    - Additionally, the Sales and Customer import page will feature a prominent hyperlink to the associated email template. The Group Member Import can use one of many, so we remind you where you can find the template being used (within the group).

Live Events

- Mobile registration forms for the Agenda and Registrant question sets now expand to use more space for easier reading and input when customers register for a program on their phone.

- The certificate requirement logic now enables **agenda item evaluations** to unlock immediately after completing the Agenda Attendance Confirmation step. Previously, unrelated steps, such as affidavits, mistakenly blocked access to these evaluations. Now, evaluations are linked to their attendance confirmation without interference from unrelated certificate requirements.

Membership

- We've updated how **discounts apply to memberships with billing cycles and group settings**:
  - **Even Discounting**: Dollar-based discounts are now split evenly across billing cycles (e.g., quarterly) to avoid over-discounting.
  - **Clearer Options**: Updated language now refers to "first membership period" instead of "first payment," with clearer renewal settings.
  - **Cleaner UI**: A new section, "Group/Classified Renewal Setting," simplifies the management of discount renewals.
- We have added a PO # field to the Renew Early modal, allowing your staff and members to enter a purchase order (PO) number if needed.
  - The new {PONumber} token allows invoices to display the PO number if entered.
  - PO numbers are stored per customer group, auto-filled on renewals, and editable.
  - PO applies to all invoices in the membership period, including manual and automated renewals.
- The Staff Notification email template for Renewal Requires Approval now includes the {CustomerAccountLinkManager} token, enabling quick access to the customer's account in Manager directly from the notification. This improves renewal approval efficiency.
- The system now logs an automatic note when a payment profile is removed after reaching retry limits for failed card or ACH payments. The note includes the date and time, group, masked payment information, and a "**Reached the retry limit**" message in red.
- Staff actions to add memberships or adjust renewal prices automatically generate notes in the user's Notes section for accountability. These notes include the date and time, staff name, membership details, and billing amounts.
- **Deletion is now blocked for any Question Sets or Custom Fields that users have answered.** You will receive a message advising you to attach new sets and hide old ones instead. This helps avoid data issues and maintains the integrity of member data.
- Profile images on the Community tab, Group Portal, Product Forums, and Virtual Summit Forums now display correctly without distortion.
- Resolved an issue in which manually processed payments did not clear "Payment Failed" or "Payment Due" alerts. The system now correctly updates the Payment Status when the Process Payment button is used.
- The "Change Group" button is disabled for groups with "No Renewal – Membership Never Expires." A hover message instructs staff to manually end the membership and add the customer to a new group. This ensures proper approval and suspension rules are enforced.

Products

- Updated the certificate logic to mark users as complete and set the completion date when **Manual Completion** is flagged by staff. This ensures that certificates are awarded immediately for products such as webinars or live events without requiring additional user action if there are no other certificate requirements.
- **Virtual Summit Addition:** Added a new Embedded YouTube/Vimeo element to the Virtual Summits Page Builder and Exhibitor areas, allowing you to paste a video URL from either platform. You can get a live preview before saving. Videos scale responsively across all screen sizes, in line with CE21's display standards.

- **Virtual Summit and Classroom update:** Updated the Add Product modal for clarity, featuring a full-width layout, more explicit instructions, enhanced search filters, and a cleaner design.
  - The new Selected Product modal allows for the configuration of product settings with an improved layout, default behaviors, and hover-help descriptions.
  - A "Save and Add New" option has been added to streamline the process of adding multiple products to a schedule.
  - The Edit Product modal now displays previously selected settings with a simplified 'Save Changes' option.
- Virtual Summit: **Uploaded Video Widget Updates**
  - Renamed "Embed Video" to Uploaded Video
  - UI cleanup: Removed the width field, added alignment options (default Left), and clarified field labels
  - Videos now scale appropriately across all screen sizes for improved mobile and desktop display.

Referral Service

- We now display all eligible professionals in a list with a "Show Full List" button; selecting one moves it to the bottom of the referral rotation list.
- Added new phone tokens: {CustomerOfficePhone}, {CustomerMobile}, {CustomerHomePhone}, {CustomerOtherPhone}, {CustomerFax}.
- Updated Referral Service Report: add "Paid Date" filter and "Show Professionals with Fees Due" checkbox (default off).

Reports

- Report Duration Updates:
  - Renamed the "Duration" column to "**Schedule Duration (in minutes)**" to clarify that it reflects the scheduled session time.
  - "Presenter Duration" and "Display Duration" column labels remain unchanged.
  - Updated Schedule Duration and Presenter Duration to **both display as numeric minutes** (no HH:MM or text) for more straightforward viewer calculations.
  - Changes applied to Product Sales, Product Details, Completion, and Registration reports.

Sales

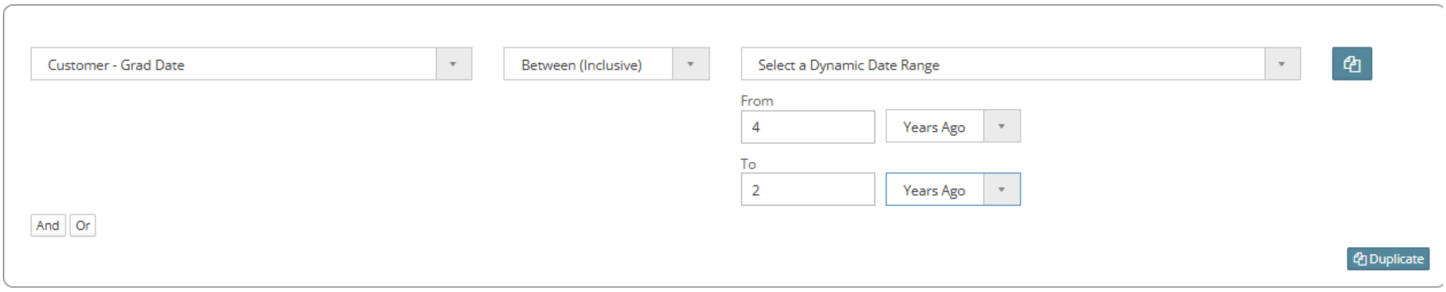
- Fixed Rounding Error in Multi-Invoice Membership Order: Updated invoice logic to round membership item prices to two decimal places instead of four.
  - Implemented a correction to apply rounding adjustments to the first invoice in the membership batch, ensuring the total matches the expected value (e.g., $839.09 vs. $839.07).
  - This prevents cumulative rounding discrepancies when charging multiple members under a single order.
  - Please note, this means your first invoice in a series may be slightly different if the number is not evenly divisible. See example below for a monthly invoice on an $800/ year group.

	Payment Date	Amount	Invoice #
	06/11/2025	$66.63	415-22881
	07/11/2025	$66.67	415-22882
	08/11/2025	$66.67	415-22883
	09/11/2025	$66.67	415-22884
	10/11/2025	$66.67	415-22885
	11/11/2025	$66.67	415-22886
	12/11/2025	$66.67	415-22887
	01/11/2026	$66.67	415-22888
	02/11/2026	$66.67	415-22889
	03/11/2026	$66.67	415-22890
	04/11/2026	$66.67	415-22891
	05/11/2026	$66.67	415-22892

- Members can now register others, even when they are the first registrant in the cart, regardless of whether these individuals are from the same group, a different group, or even non-members. We will apply the appropriate pricing for each registrant. Restrictions will remain in place for group settings that prevent certain registrations, accompanied by clear error messages. This enhancement addresses previous challenges related to registering additional attendees, ensuring accurate pricing and a more streamlined checkout process.
- **Added the recently released Cash Discount functionality to Memberships and Donations.**
- Admins can now manually grant or revoke content access for pending ACH orders, just as they do for pending check payments. This allows your staff to provide users with early access to course content while still preventing access to certificates until full payment is received.
- The Search widget will now display group-based price adjustments as Sold Out with a strikethrough once its maximum use limit is reached, aligning with the Product Details page and preventing users from adding unavailable discounts to their cart.

Smart List

- We've **improved Smart List syncing with ActiveCampaign** by skipping invalid contacts instead of failing the entire batch, respecting API rate limits, logging errors more clearly, and fully unsubscribing outdated contacts. Syncs should now be more reliable and easier to troubleshoot.
- Enhanced Date Filters for Dynamic Lists New "Today" Filter:
  - Introduced a dynamic “Today” option for date criteria, ensuring lists always reflect the current day without requiring manual updates.
  - Dynamic Date Ranges: Introduced the “Select a Dynamic Date Range” option, allowing users to filter by flexible ranges such as Days Ago, Weeks Ago, etc.
  - Improved Labeling: Renamed “Select Date Range” to “Select a Static Date Range” to clarify functionality.
  - List Refresh Information: We added helpful information to the Parameters tab that explains the list refresh behavior and campaign integration.



Viewer

- Viewer Slide Layout Default added:
  - Added Slides Layout setting to all products using the CE21 Viewer (webcasts, webinars, on-demands, replays) where converted slides are used.
  - Admins can now set a default viewer layout (Default, Vertical, Large Slides, Large Video) to improve visibility for dense or hard-to-read slides.
  - End users may still change their layout preference, but it will reset to the admin-defined default upon refresh or relaunch.