RELEASE 25.07

CE21 UPDATES + RELEASE NOTES

New Features and Updates for the (25.07) 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

- **“Address Block” Bug Fixed on My Account Page:** Users now only need to enter their address once when prompted by the Required Information modal. Previously, some users had to re-enter it due to a saving issue, which has now been resolved.
- An **audit log** has been added to record all changes to standard and custom **Customer Settings** fields, including modifications to field values and reordering actions. This provides a comprehensive historical record that extends beyond what the “Modified By” column displays.
- Fixed a problem where partial credit was occasionally not recorded as a system note on the user’s account. Now, **all partial credit actions are logged on the Notes tab.**

Catalog Appearance

- Catalog Settings > Display Options > Search Settings: A new option now allows you to toggle the Closed Caption search filter on or off in the sidebar of the catalog search page. By default, this setting is enabled for all catalogs to maintain consistency with the existing layout, but you can disable it if preferred. The setting is labeled “**Enable the Closed Caption search filter in the sidebar.**”
- Under Catalog Settings > Display Options > General Settings, there's a new option called “**Remove Closed Captions from the Media Type dropdown in the default menu bar.**” This setting hides products with Closed Caption enabled from the Media Type dropdown in catalogs. It is enabled by default for all catalogs to maintain the current layout, but you can turn it off if desired.
- Fixed issue where courses appeared as having Closed Caption enabled when no captions were active. The bug occurred only if the video in the Presenter included a CC file that was not enabled.

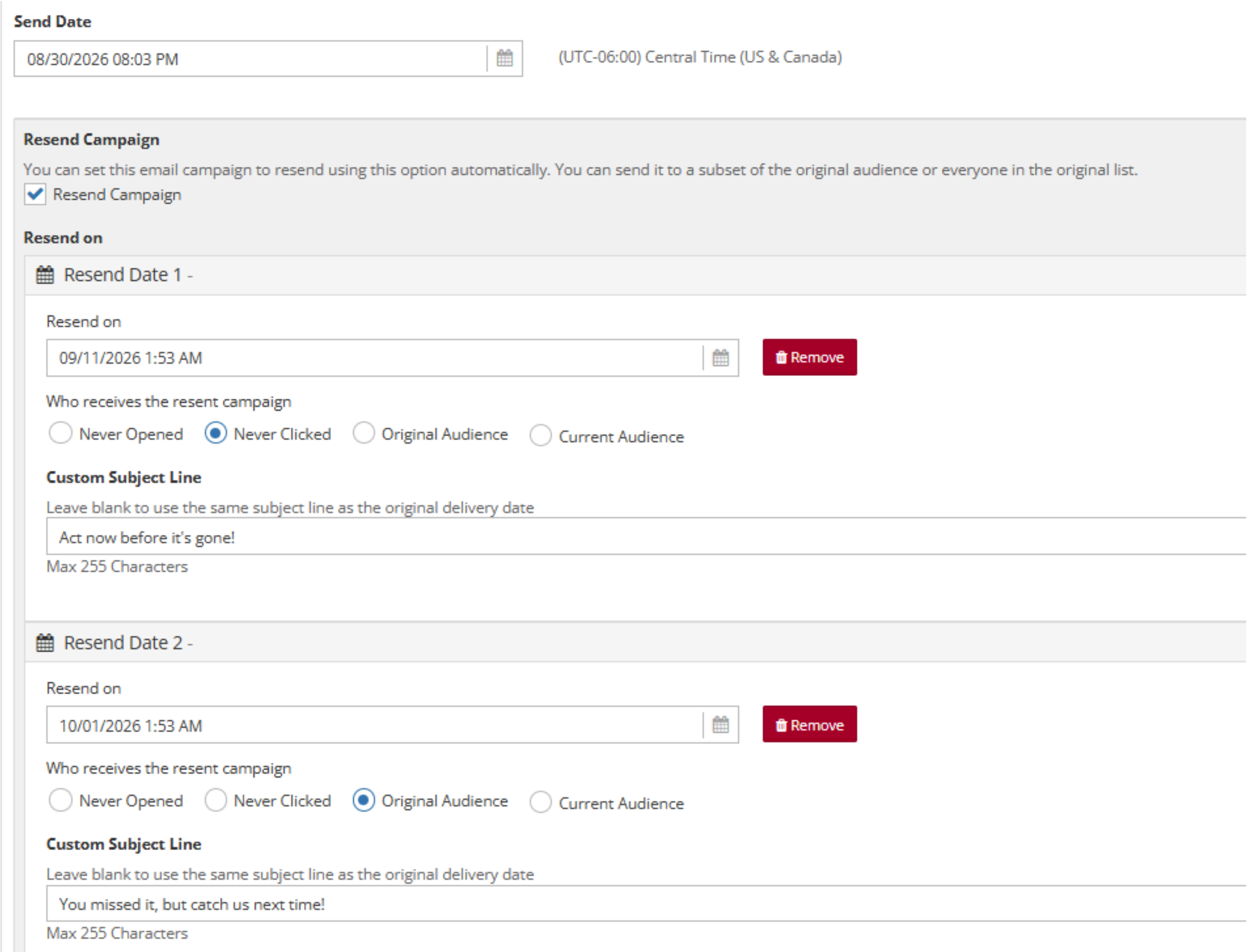
Donations

- We’ve added three new tokens to the list in all Donation-related email templates, including those sent using the "Email Invoice" button:
  - {**InvoiceAmount**} – Displays the full invoice total
  - {**InvoiceAmountReceived**} – Shows the amount paid to date
  - {**InvoiceAmountDue**} – Indicates the remaining balance
- Improved validation for donations at checkout prevents outdated or incorrectly configured donations from being processed. If a donation option changes, users receive a message prompting them to re-add the donation, following a similar process to that for products and memberships, ensuring accurate processing and maintaining better cart integrity.

- Invoices for paid donations will now correctly show a $0 balance due. In the past, a balance would still appear even after payment was made.

Email Marketing

- You can now schedule multiple **email resends with custom audiences, optional subject line changes, and a more straightforward setup.** Each resend is organized in its collapsible section, and revised wording helps clarify targeting options, such as "Never Opened" or "Never Clicked." The campaign report has also been updated to clearly display resend details.



- When a **user marks an email as spam, we now automatically unsubscribe** them from all marketing and product notifications, but still allow critical system emails, such as order confirmations and password resets, to go through. This ensures they aren't blocked from essential communications while respecting their marketing preferences.

Live Events

- **Live Event + Guestbook**: When you use a guestbook for a live event, we now load the product card as seen in the user's account, giving users direct access to handouts, badges, venue maps, archived videos, and more. Whatever they see under that product on their account page, they will be able to view when they access it via the guestbook link.

- We have **improved the mobile catalog registration process for agenda items**. Agenda pop-ups now utilize more screen space, display essential information in a clean, single-column format, and eliminate unnecessary elements, such as navigation arrows. All fields are fully responsive, making them easier to tap, read, and complete on smaller screens.
- When setting up a live event, **you can now adjust trigger conditions on cloned or existing agenda items** with no registrants. If there is at least one registration for the event, editing is blocked with an error message to prevent changes.
- We've streamlined the "Live Event Attendance" and "Agenda Attendance" tools in the **Event Portal**. Marking attendance now happens instantly with no full-page reloads, thanks to new AJAX-based updates. This improves speed, reduces server strain, and creates a smoother experience for staff during high-volume events.
- We've resolved an issue where badges in cloned products could display outdated or invalid QR codes, resulting in errors during printing or scanning. Going forward, QR codes will no longer carry over during duplication.
- To improve registration flow stability and prevent data loss, agenda items displayed due to a Number-type question trigger can no longer act as triggers for other agenda items. The system now blocks such nested trigger setups.
- Reward Points + Live Event Agenda items with a price: Reward Points can no longer be applied to Agenda Items or products marked as "Exclude from Global Discounts/Reward Points." Both the Manager and Catalog order screens will now show disclaimers listing affected items. The option to apply Reward Points updates to include only eligible items, ensuring points do not exceed the allowed amount.

Memberships

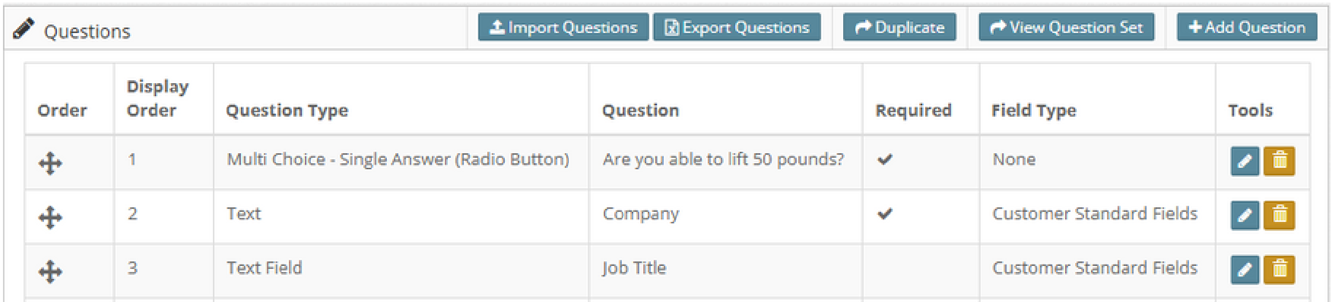
- We've resolved an issue where **"Payment Due" banners** did not appear right away when multiple child group fees were due. The system now accurately displays alerts in real-time, even when multiple payments are processed for the same membership.
- We've resolved several invoicing and membership issues to **improve billing accuracy and tax handling.** These updates improve reliability and transparency across billing scenarios. Highlights include:
- Invoices now correctly generate for child groups and CBM employees added after renewal.
- Tax is consistently applied, including on manual and imported invoices, and respects tax-exempt settings.
- Group join requirements are skipped for staff-driven changes to streamline admin workflows.
- Donation and partial payment handling is improved to prevent order issues when check amounts don't match totals.
- Additional display and calculation corrections ensure accurate pricing for discounts, employee fees, and renewals.

Notifications

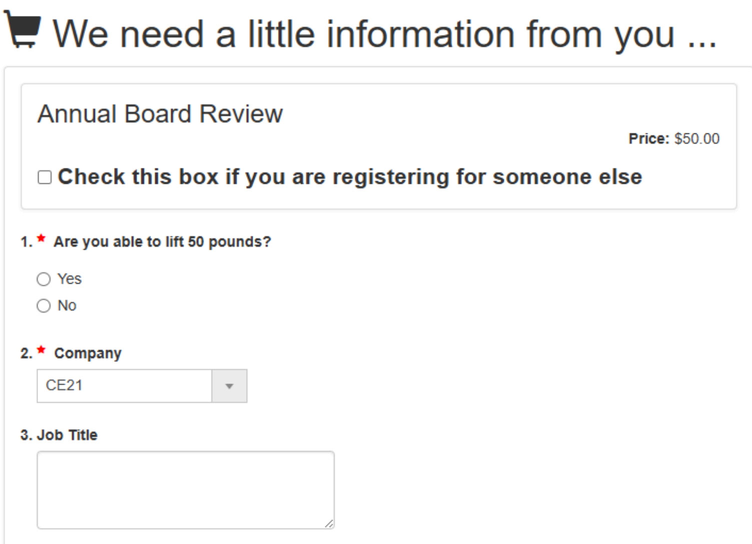
- We've added new message tokens to the Donation and Membership Payment Failure Notification templates to give customers more context when a recurring payment fails:
  - {**RetryNumber**} – Displays the total number of retry attempts configured by the tenant.
  - {**FailedAttempts**} – Shows how many times the customer's payment method has failed so far.
  - {**LapsedTimer**} and {**SuspendedTimer**} – Now available in Membership templates to indicate how long until the membership lapses or is suspended.
- We've added three **new tokens to the list in all Donation-related email templates**, including those sent using the "Email Invoice" button:
  - {**InvoiceAmount**} – Displays the full invoice total
  - {**InvoiceAmountReceived**} – Shows the amount paid to date
  - {**InvoiceAmountDue**} – Indicates the remaining balance
- We've resolved an issue where certain About to Expire Classified Ad emails were not appearing in the user's Communication tab.

Products

- **Use Customer Profile Fields in Registration Question Sets:** You can now add Customer Standard and Custom Fields to registration question sets. This feature works the same way as in the Forms. Select a question type of –None– to use the standard form fields, or choose Customer Standard or Custom fields to include questions that your users only need to answer once, since the information is stored within their profile fields. If you want to learn more about Registrant Question sets to improve your registration process, [please read our FAQ about this useful form feature].


Questions — Import Questions | Export Questions | Duplicate | View Question Set | Add Question

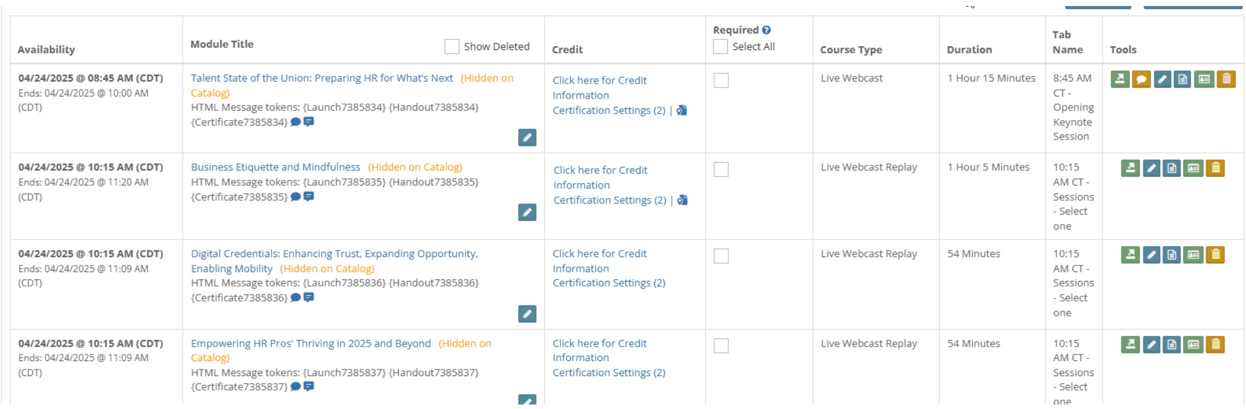
Order	Display Order	Question Type	Question	Required	Field Type	Tools
	1	Multi Choice - Single Answer (Radio Button)	Are you able to lift 50 pounds?	✔	None	
	2	Text	Company	✔	Customer Standard Fields	
	3	Text Field	Job Title		Customer Standard Fields	



  - If a user is not signed in and you use these customer fields, they will be prompted to sign in first.
  - These fields automatically populate with customer profile data and save updates to the profile.

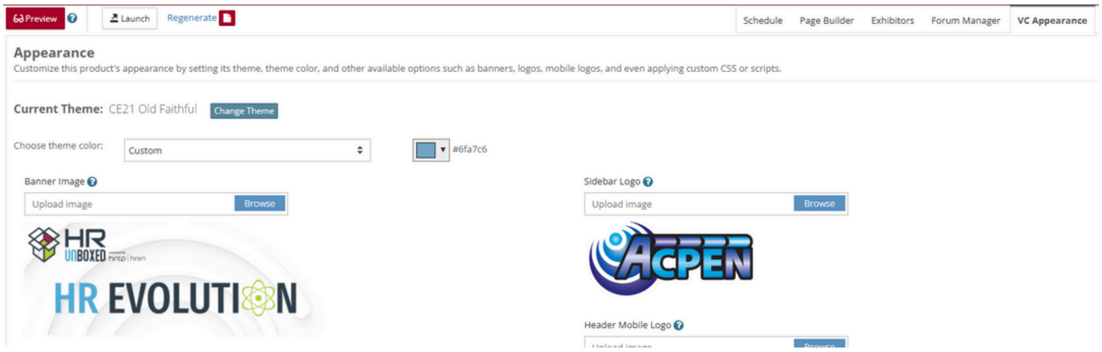
- ○ **If these customer fields are included on the registration form, the purchaser cannot edit them for the person they are registering.** Instead, the registrant will receive an email to securely complete their own form.
- ○ The checkbox to register for someone else is now more visible and has been moved to the top of the form (if you allow this on your catalog). See image above.
- ○ Logged-out users will be prompted to log in before answering profile-related questions to ensure data sync.
- ○ Audit logs will record all profile modifications made via registration forms.

- **Virtual Summit & Classroom Schedule Enhancements**
  - Enhanced Virtual Summit and Classroom navigation so that when users click "Return to Virtual Summit/Classroom" and close the viewer, the background page no longer reloads, maintaining their scroll position and place in the program list.
  - **Improved Schedule Tab Display**: Availability dates now appear in bold with a clear "Ends:" timestamp for Live Webcasts, Video Replays, and Webinars, providing improved visibility into event timing.
    - **Certification Info Added:** The Credit column now includes a "Certification Settings (x)" indicator showing the number of certification requirements per product.
    - **Certificate Icon & Quick Preview:** A certificate icon appears when certificates are assigned. Clicking it or the certification settings link opens a read-only preview modal of the product's certification setup.
    - **Easy Access to Certification Editing:** From the preview modal, users can open the full product certification settings in a new tab for quick adjustments.



Availability	Module Title (Show Deleted)	Credit	Required (Select All)	Course Type	Duration	Tab Name	Tools
04/24/2025 @ 08:45 AM (CDT) Ends: 04/24/2025 @ 10:00 AM (CDT)	Talent State of the Union: Preparing HR for What's Next (Hidden on Catalog) HTML Message tokens: {Launch7385834} {Handout7385834} {Certificate7385834}	Click here for Credit Information Certification Settings (2) |		Live Webcast	1 Hour 15 Minutes	8:45 AM CT - Opening Keynote Session	
04/24/2025 @ 10:15 AM (CDT) Ends: 04/24/2025 @ 11:20 AM (CDT)	Business Etiquette and Mindfulness (Hidden on Catalog) HTML Message tokens: {Launch7385835} {Handout7385835} {Certificate7385835}	Click here for Credit Information Certification Settings (2) |		Live Webcast Replay	1 Hour 5 Minutes	10:15 AM CT - Sessions - Select one	
04/24/2025 @ 10:15 AM (CDT) Ends: 04/24/2025 @ 11:09 AM (CDT)	Digital Credentials: Enhancing Trust, Expanding Opportunity, Enabling Mobility (Hidden on Catalog) HTML Message tokens: {Launch7385836} {Handout7385836} {Certificate7385836}	Click here for Credit Information Certification Settings (2)		Live Webcast Replay	54 Minutes	10:15 AM CT - Sessions - Select one	
04/24/2025 @ 10:15 AM (CDT) Ends: 04/24/2025 @ 11:09 AM (CDT)	Empowering HR Pros' Thriving in 2025 and Beyond (Hidden on Catalog) HTML Message tokens: {Launch7385837} {Handout7385837} {Certificate7385837}	Click here for Credit Information Certification Settings (2)		Live Webcast Replay	54 Minutes	10:15 AM CT - Sessions - Select one	

  - We've overhauled the **Virtual Summit Appearance tab** to make it more intuitive and easier to use by replacing the confusing "Custom Token" fields with user-friendly image upload options based on which theme you've selected.
    - Each theme now displays a thumbnail of the current image (including defaults) directly under each upload field.
    - The default mobile and desktop logos have been applied and will now display properly based on the device type.
    - Labels, layout, and hover-over instructions have been cleaned up for clarity across all themes.
    - Theme selection now dynamically updates the Appearance tab to reflect each theme's unique settings.



- For **iOS users launching programs with participation codes**, we replaced the confusing in-list message with a clear modal displayed before video playback, which explains full-screen limitations and recommends using a desktop or the CE21 Mobile app. Users must acknowledge the message before the video starts, thereby improving clarity and the overall user experience.
- In the **Webinar Settings tab**, we've improved usability by hiding the Chat, Forum, and Other widgets for archived webinars, as these features are not used post-event, which is the only time a webinar product uses the CE21 viewer.
- Resolved the problem with the **Current Connection column in the Upcoming Programs widget** on the Dashboard.

Referral Service

- Referral Professional Display Fixes:
  - Improved address formatting and spacing.
  - Fixed duplicate entries after merging professionals.
- Resolved an issue where staff could not enter a referral fee payment equal to the amount due because of decimal value mismatches. Payments now accept amounts that precisely match the remaining balance.
- Tenants with Referral Service can now see Referral Service Fees as a new product type in Product Sales and Transaction Reports. Reports include client contact information and a direct link to Referral Service settings.
- The Client Details page has a new Purchases tab for reviewing these fees.

Reports

- Users can now run **Completion, Registration, Evaluation, and Product Sales** reports **without a required date range** when filtering by Product, Evaluation, or Customer. This enhancement improves flexibility for historical data analysis while maintaining date restrictions when no filters are applied.
- **Evaluation Completion and Summary reports** for live events now include questions based on speakers linked to Agenda Speakers, not just the main Speaker field. This guarantees complete evaluation data for agenda items assigned solely to Agenda Speakers, enhancing accuracy and feedback in both Evaluation Completion and Summary reports without altering the user interface.
- Fixed an error that was preventing the **Group Members Report** from working when Custom Data fields were also selected.
- **Jurisdiction Credit Report**: Improved jurisdiction credit syncing for reports. New credits added to a product *after* the registrant selects their credit type now automatically appear in reports, ensuring accuracy and reducing confusion.
- The **GL Summary Report** has been updated to display amounts for child groups under their respective assigned GL Codes. Previously, child group amounts were recorded under the parent group's GL Code, making accounting reconciliation difficult. This update enhances the accuracy of financial reporting.

Sales

- Since most of you don't use the Discount landing pages, we've changed how to manage them. All **Discount page details are now under the collapsible "Public Sales Page" section**.
    - This simplifies managing your basic discounts by removing the distraction of advanced settings.
    - Staff can now choose whether to enable the public-facing page to promote discounts and eligible products, with optional controls like permalink editing and a new "noindex" flag to prevent search engine indexing.
    - Existing discount pages remain, with search engine indexing turned off by default.
- The product **swap pop-up has been enhanced for clarity and improved to handle reward points more effectively**. The product's price label now shows the "Original Product Purchase Price" (including tax if applicable), and the reward point value includes a warning if the product is ineligible. When selecting a swap-in, detailed pricing and reward details are displayed, along with a cancel option. The cost difference now accurately reflects taxes, and the selected product is highlighted. After the swap, taxes and reward points are properly tracked, adjusted, refunded, or reapplied as needed.
- We have implemented foundational changes to enhance the tracking of payments across individual order items, particularly those involving agenda items, discounts, and refunds. While there are no visual changes in the UI, several key behaviors were improved:
    - Global discounts and reward points are now calculated more accurately when exclusions apply (e.g., agenda items).
    - Agenda items purchased post-registration in Manager now correctly apply cash discounts and tax, and issue accurate refunds.
    - Triggered agenda items no longer duplicate costs when edited post-registration.

Smart Lists

- We improved the Data Sync experience by displaying a **visible "Last Sync" timestamp** (in your catalog's timezone) next to the Sync Data button, highlighted in red italics to indicate data freshness. When you click Sync Data, the current table is replaced with a spinner and a "Please Wait... Syncing Data" message, while the Sync button shows a loading indicator. Once the sync is complete, the page refreshes to display the updated data, and the timestamp briefly turns green to confirm success.