RELEASE 25.09

CE21

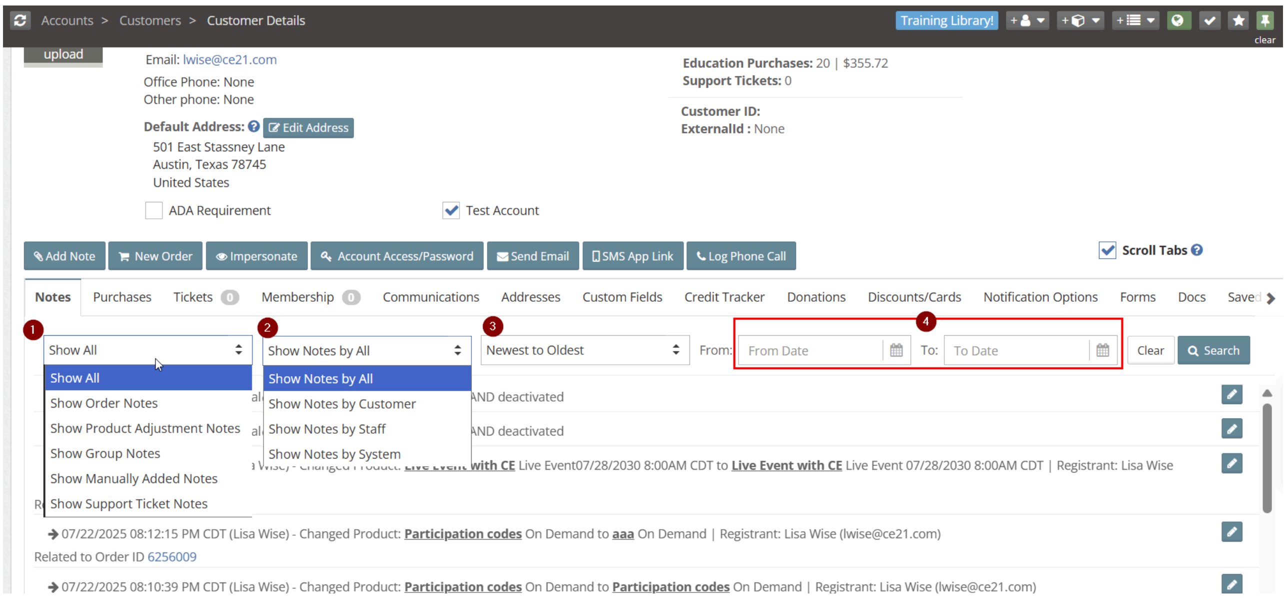
UPDATES + RELEASE NOTES

New Features and Updates for the (25.09) 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

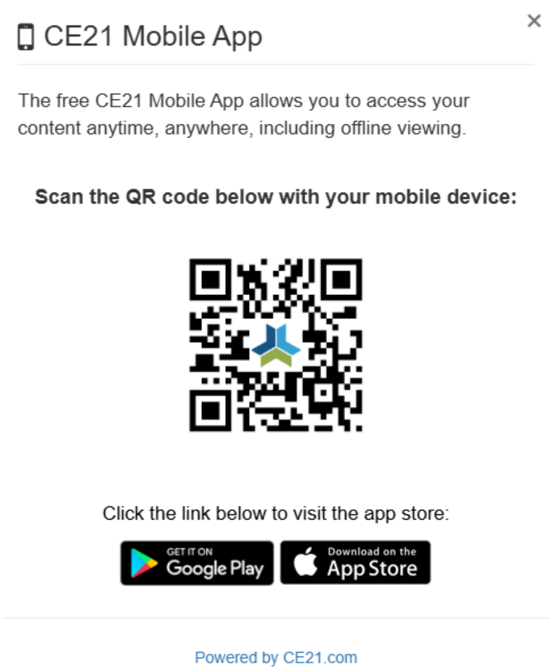
- The **Notes tab in Customer and Speaker Details** has been improved to give staff better filtering, sorting, and management options:
    - **Filters**: Added Show Group Notes, Show Product Adjustment Notes, Show Notes by All/Customer/Staff/System, Sort By, and Date Range.
    - **Dropdown Updates**: Reordered and relabeled note types for clarity.
    - **UI & Behavior**: Unused fields and the trashcan icon have been removed. Edited notes now include (Edited by {StaffFullName}) at the end. Membership change notes now begin with "Group:". Timestamps now show seconds to ensure proper chronological sorting—Clear and Search buttons have been added.



- We fixed an issue where the Save Changes button in My Account appeared unresponsive when required fields were missing. The system now **automatically scrolls to the first incomplete required field** and highlights it, ensuring users can clearly see and correct validation errors.
- Fixed issue where users created through orders were not receiving account creation emails if their orders were in a pending check status.

Catalog Appearance

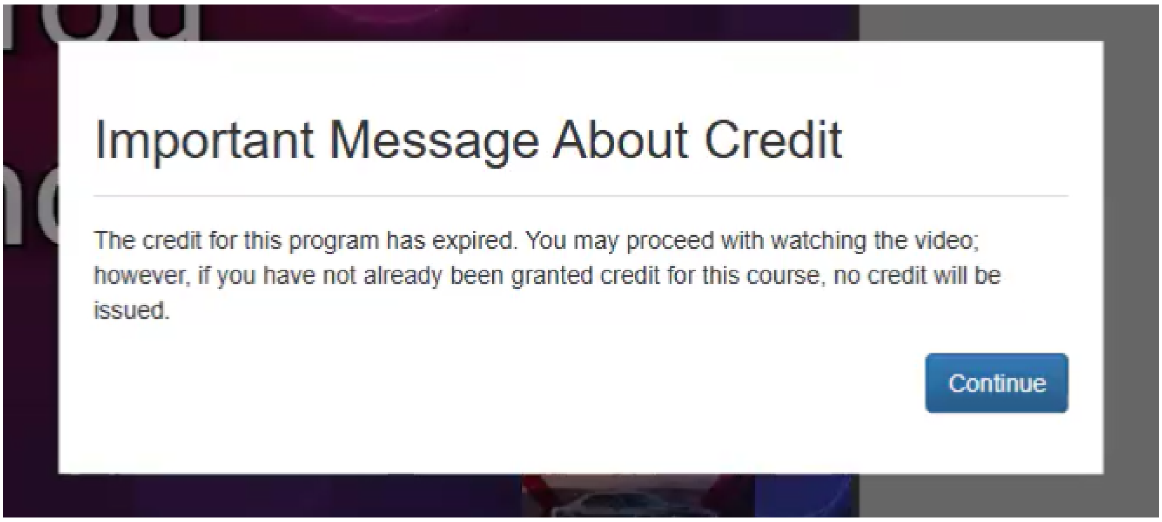
- The **Registration & Payment page for POs** has been updated for **improved print formatting.** Changes include removing borders, moving the 'Payment by PO – Registration Form' to the top-right, aligning the credit card checkbox with the check option, consolidating the Expiration Date and CVV fields, removing the cart item line, and right-justifying the date with the Order ID. These updates ensure the page prints cleanly in portrait mode on a single page, where applicable. Longer orders will still span multiple pages.
- We updated the "**Get the CE21 Mobile App" tool in the catalog** by replacing the outdated SMS download option with a QR code. The modal now offers a clearer, more modern download experience across iOS, Android, and desktop, with refreshed text and layout, updated branding, and app store buttons.



- We introduced a new configurable [Group Details Page layout in Manager > Appearance > Layout](), which includes a fixed widget for group info and a default no-sidebar design. This allows you to customize the look and feel of your Group Information page, just as you can add widgets and other design elements to the Product Details Page.

Certificate Requirements

- We have enhanced the learner experience for programs where **all credits have expired**. Now, users can continue accessing videos while a clear "expired credit" pop-up is displayed. All credit-related requirements, except for documents and evaluations, are disabled. When credits are fully expired, the certificate requirements will show a clear expiration message. Please note that archive access and the existing video access rules remain unchanged.



- **Quizzes can now display any number of questions** from a question bank, removing the previous limit of 100 questions.
- The {**SeminarCompletionDate**} token in Certificates or Documents now displays the full month name (e.g., October) instead of the three-letter abbreviation.

Classified Ads

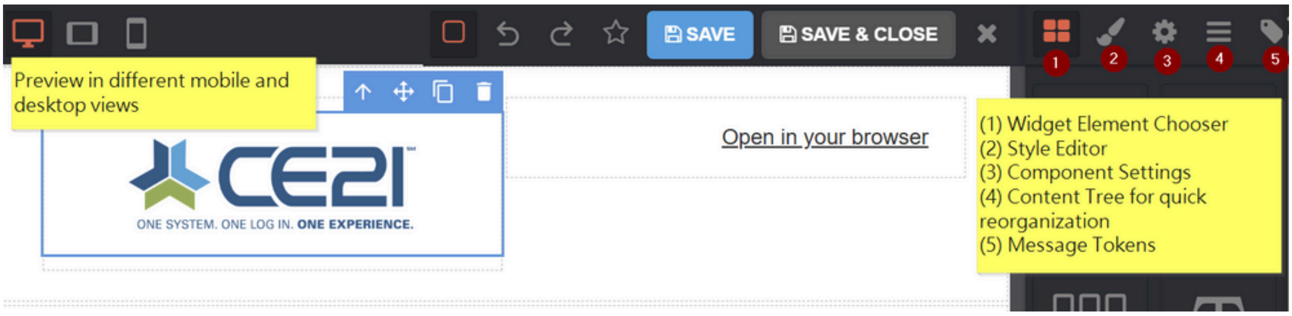
- **Refunded Classified Ad** fee plans now display as “Refunded” with the date, show a Deactivated status, are disabled for editing, and are removed from the catalog. Staff can reactivate ads if needed. Refunded and deactivated ads cannot be renewed.
- **Renewing updates:**
    - Staff can set when the Renew button appears (Days, Weeks, Months; the default is 2 Weeks) in the Fee Plan.
    - Members can enable Auto-Renew for ads at any time through an updated modal, even if they didn’t choose auto-renew when they initially purchased the ad.
    - Cancel Auto-Renew is available in both Manager and Catalog for easy management.

Donations

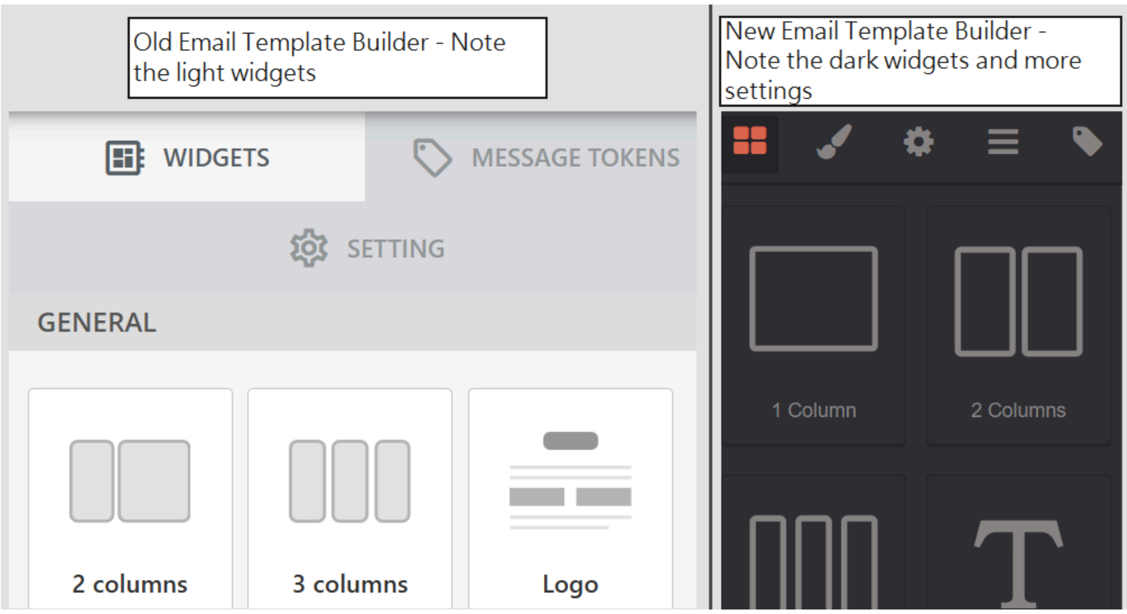
- The Donations tab in your account now appears **only when the donor has active or completed donations**, keeping their account tabs cleaner.
- Donation confirmation emails for pending ACH payments are now sent only after the payment is successfully processed, ensuring the {InvoiceAmountReceived} token displays the correct amount.

Email Marketing

- We have updated our Email Template Builder to include a tool that is more compatible with the design limitations of Outlook-powered email services. All the campaign-building tools and reports remain the same; only the template builder has changed. The new template builder operates very similarly to the previous tool we used.



- This updated Template builder will create the email in a standard email-sized container. You no longer need to add a container to stop your emails from stretching across the full width of any screen size the recipient has.
- If you copy from an email sent before 11/25/2025, it will use the old template builder, which might cause Outlook issues depending on your design. To access the new template tool, create a new email from scratch. Duplicating templates made on the new template builder will automatically use the updated tool.
- Wondering which tool you're using? We will automatically select the new template builder tool for each new template you create, but if you're duplicating, you might get confused. To check: the new template builder's widget page has a dark background, unlike the previous version, which had a light background for the widget chooser.



Forums

- We've improved forum moderation and group admin management for clarity and ease of use:
  - **Group Admin ACL Improvements**:
    - When adding a Group Admin or Forum Moderator, the "Admin" ACL is now selected by default.
    - If no ACL is selected, the system requires one before saving, with the message: "Please select the ACL to save this Group Admin."
  - **Auto-Approve Future Posts**
    - The "Approve to Post" tool is now labeled "Auto-Approve Future Posts" to clarify that it automatically approves all future posts from a trusted user, unlike the standard "Approve," which approves only a single post.

Live Events

- Since the **expiration date applies only to a Live Event when the program's Archive** is available, we have updated the Live Event expiration date settings for clarity and consistency. It will now appear below the Archive setting in the Information tab only when Archive is enabled, with the default expiration date visible for editing. If updated, your staff will be prompted to apply changes to all existing orders.
- Additionally, **the expiration date is no longer displayed** in the following places when Archive is not allowed to ensure expiration information is only shown when relevant:
  - User account product cards (including the Live Event guestbook view)
  - Product details page
  - Search page or widget view
- The **Agenda Status column in the registrant tables** and exports now accurately indicates user interactions:
  - **Complete**: The user answered all questions or selected no options when none were required.
  - **Pending**: The user has not completed the agenda items.
  - **Bypassed**: Staff registered the user and skipped the agenda items.
  - **Blank**: No questions were asked during registration.
  - To enhance clarity, the previous "**Default**" value has been removed.

Event Portal Updates

- For Live Events with the Event Portal enabled, two new columns will be added to the Current Registrant list:
  - **QR Code**: Shows a thumbnail of the registrant's QR code and exports it as an image link.
  - **QR Code Link**: Shows and exports the URL behind the QR code.
  - This allows clients to continue using the CE21 Event Portal for check-ins while utilizing exported QR codes for third-party badge creation. The columns only appear when the Event Portal is active.
- In the **Event Portal on iPhones**, the badge scanner now defaults to the back camera and retains the selected camera across scanning modes. Scanning sound is fixed on iOS.

Manager/Settings

- We have updated **CKEditor**, our rich-text editing tool, across the Manager. The default setting for the **link target now opens in a new window (_blank)**, instead of the previous default, which opened links on the same page. You can still manually override this setting if needed. This change applies consistently to all instances of CKEditor, including emails, product descriptions, and pages.

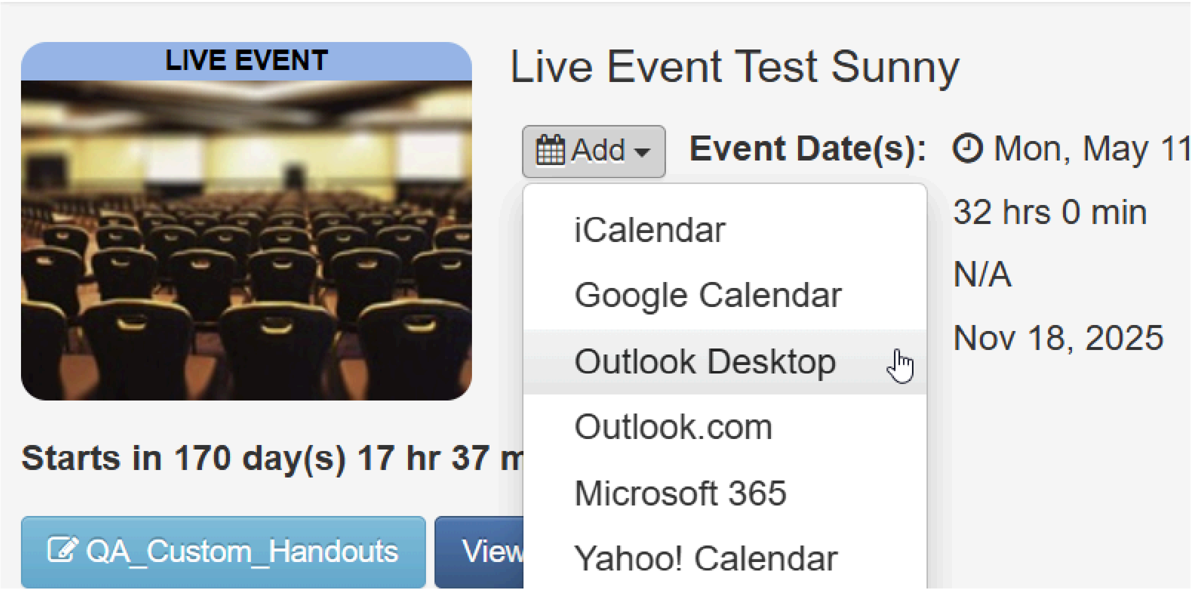
Memberships

- Company-Based Memberships: The "Please provide employee information" modal for CBM memberships now **automatically fills in existing employee details when a company is already in the database.**
  - The header has been updated to "Add Employees to the Membership," and the subheader now shows the number of current employees.
  - Auto-fill is disabled for membership types with employee limits.
- **Transferring memberships between companies** now accurately updates employee and owner records, ensuring users do not remain active in the previous company or become incorrectly linked

after ownership changes.
- Groups will now **retain their original billing cycle when reactivated**, preventing incorrect annual charges and ensuring that any applicable discounts are correctly applied.
- Group status changes scheduled at renewal are now correctly processed across all time zones, preventing memberships from being skipped even **when changes occur near midnigh**t.
- **Renewals are calculated accurately when memberships include child groups,** preventing duplicate charges at checkout and ensuring invoices reflect the correct total.

Notifications

- **Tech Support and Help Bucket ticket notifications** are now enabled by default for all users, ensuring important updates are never missed. Users can still manually opt out if needed.
- Following recent user reports about the **Outlook Add to Calendar** tools, we have revised how those tools interact with Outlook. Links across catalogs and emails now offer three different Outlook options. They are:
  - "Outlook Desktop," which provides an .ics file and is best suited for Outlook Classic.
  - "Outlook Online," now labeled as "Outlook.com".
  - The new "Microsoft 365" option for business and school accounts.

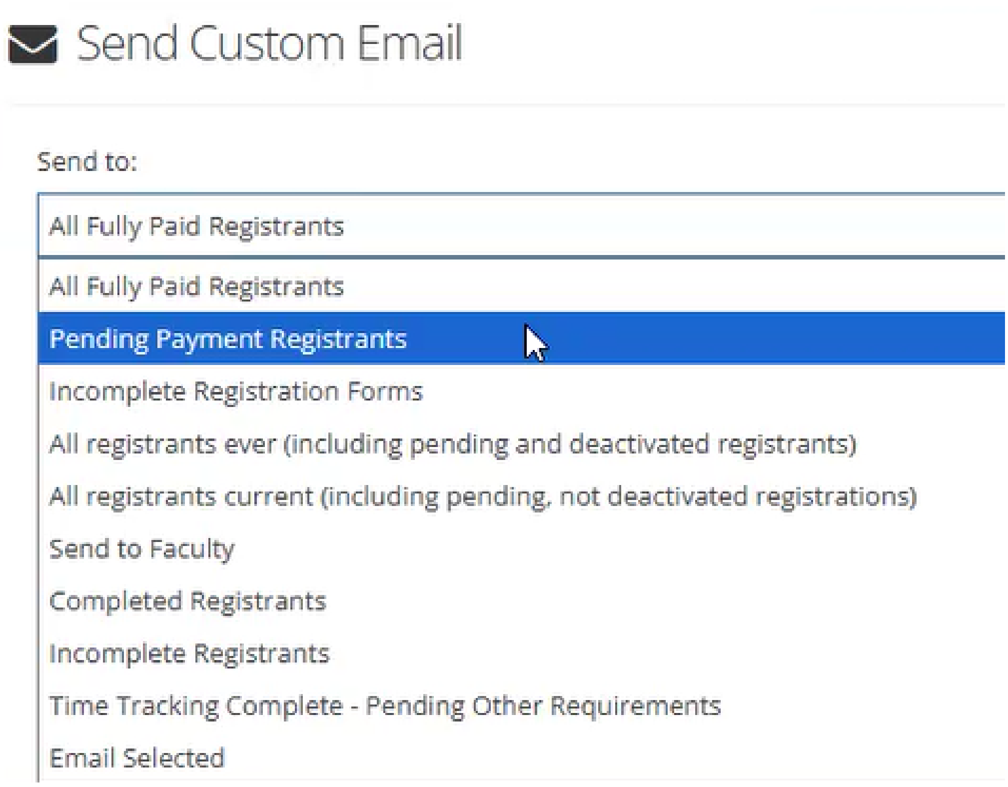


- The {**DirectLaunchShortLink**} token in Event Reminder emails has been updated to generate links using the correct www.gotomyseminar.com domain, ensuring the links now work properly.
- The {**InvoicePaymentLink**} token now correctly populates when sending emails for **multiple invoices**, ensuring all payment links appear as expected.
- **Event Reminder (1-16) Emails:** New message tokens: {CustomerCompanyName} and {PriceAdjustmentName}.
- **Order Confirmation Email**: {CustomerCompanyName} message token added for the purchaser's company.

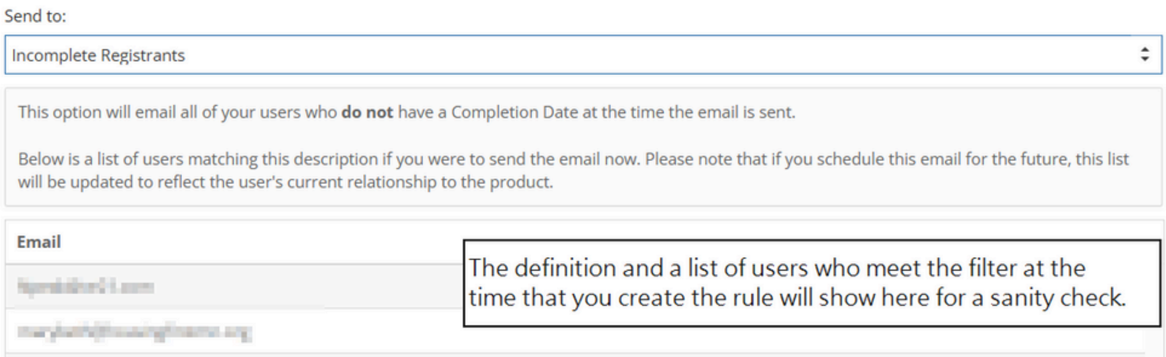
Products

- The **Email Registrants** tool in the Information tab in a Product has been updated to provide clearer wording and additional targeting options for sending emails to registrants and faculty.
  - Updated Options:
    - **All Fully Paid Registrants** (formerly All Current/Paid Registrants): Sends emails only to users who have completed full payment.
    - **Send to {LabelforFaculty}**: Emails all users assigned the faculty role for the product.

- New Recipient Options:
  - **Completed Registrants:** Emails users with a completion date.
  - **Incomplete Registrants:** Emails users without a completion date.
  - **Time Tracking Complete – Pending Other Requirements:** Emails users who passed Time Tracking but haven't completed other requirements (shown only if Time Tracking is required). *Conditionally Displayed:* appears only if Time Tracking is a Certificate Requirement.
  - **Incomplete Registration Forms**: Emails users who haven't completed their Registrant Question Set or Agenda Items (shown only if applicable to the product). *Conditionally displayed:* appears only if the product has applicable Registrant Types or Agenda Items.
  - **Pending Payment Registrants**: Emails users whose payment is pending (checks, pay later, PO, or partially paid; excludes pending ACH but includes failed ACH).



- Additional Improvements:
  - Explanatory text is now displayed below the email option selected to clarify who will receive the message.
  - For all options except "Email Selected," a note is added: "Below is a list of users matching this description if you were to send the email now. Please note that if you schedule this email for the future, this list will be updated to reflect the user's current relationship to the product."



- The **column chooser in the Information tab of a product** has been simplified for greater clarity and usability.
  - To enhance load times, unnecessary columns have been removed. For additional details about the registrants, you can easily access the Registration Report, which is conveniently linked in that section.
  - Selected columns have been renamed for better understanding, and some columns will now only display when relevant (for example, the Event Date will only show for Video Replays, while the Live Event Attendance fields will appear only when attendance is a certificate requirement).
  - In live events, agenda items now wrap neatly next to their corresponding checkboxes, and table widths automatically adjust for easier viewing.
- We've enhanced the **Bulk Operations menu to make it smarter** and less confusing. Options now appear only when relevant—for instance, "Mark selected registrants' Time Tracking complete" or "Mark selected registrants as Manual Complete" will appear only if the product contains the related certificate requirements.
- **Customer Alerts created within a product** have been updated for clarity, and alerts now appear for all products, including $0 live events with agenda items that incur additional costs.
- Added a **"Sync Time Tracking and Cert Status" button for all product types,** only when certificate requirements are present. It enables staff to update the certificate completion status in bulk, enhancing consistency across products. Our system periodically syncs the users' certificate status, and when users click the certificate button, it also updates their individual certificate status. This button is especially useful when you've made changes and want to synchronize all users' statuses at once.
- **Logging in via the guestbook** now works correctly for speaker users when the reward points feature is enabled.
- The **Guestbook login issue** has been fixed. The "Continue" button now displays correctly, and the delays caused by the captcha popup have been resolved.
- The **Reviews tab** now displays evaluation results only after customers submit their evaluations. Partially completed or unsubmitted evaluations are no longer displayed, ensuring consistency in reporting.
- **Registrant Question Sets**: Fixed an issue where uploaded files or entered values during registration were being removed from records.

Referral Service

- You can now transfer referrals between professionals in Manager.
  - **Transfer Referral Button**: Added to the top-right of the manage referral modal for all statuses except Closed and Transferred.
  - **Select Professional Modal**: Searchable list to choose the new professional while maintaining round-robin order. Includes Save Changes and Cancel options.
  - **New Status**: "Transferred" appears in referral tables and reports and is treated as closed.
  - **Transfer Behavior**: All referral details are copied except the original date. Original referral remains with status Transferred (linked to the new professional), and a new Open referral is assigned to the new professional.
  - Hyperlinks in the original professional's and client's accounts open the new referral modal. Manage buttons are disabled in My Account for transferred referrals.
- Professionals can now view referral statements in the Catalog **after a referral is closed**. The Manage button changes to Referral Statement, allowing users to download or email statements.
- Fixed an issue where Referral Service Statement email templates were not appearing in the **Email Reminder Rule dropdown**. All applicable templates now populate correctly, and they no longer need to be manually edited before selection.

- Resolved an issue where **referral notifications** were not being sent to clients and professionals from the Catalog.

Reports

- **Evaluation Completion Report** now displays all questions, even those with **identical text,** ensuring that no data is hidden or overwritten in reports. Triggered questions accurately reference the specific question, regardless of duplicate text.
- The **Registration and Completion** reports now accurately display individual course and module records when users select a classroom or summit and click Show Individual Classroom Components.
    - Previously, modules were not shown if the Virtual Summit or Classroom name was added to the Product Search field.
    - Note: If the selected product type is Classroom or Summit, the breakdown is not displayed because modules are a different product type.
- The **GL Totals Summary Report** now generates correctly when all G/L codes are selected. Previously, selecting all codes caused an error when more than 50 codes were pulled simultaneously.

Sales

- The **GL Code and Accounting Class** tools have been updated to improve billing accuracy and clarity for tenants.
    - **Defaults & Help Text:** The "Auto Add to All" option is now labeled "Add as default to all:" with a help bubble explaining that defaults apply to all sellable items and can be edited individually.
    - **Labels**: All product types now display your custom label for that item.
    - **Expanded Items:** You can now add GL and Accounting Codes to Donations, Classified Fee Plans, Shipping, Handling, Client Referral Fee, Taxes, Cancellation Fee, Payment Plan Surcharge, and Retail Delivery Fee.
    - **Single Assignment Enforcement**: Some of these items (taxes, shipping, surcharges) can only be assigned to one GL Code or Accounting Class.
    - **Audit Logging**: All changes to the codes are recorded in the audit log.
    - **Reports**: Product Sales Reports and similar reports now include all new GL Code and Accounting Class values, including Shipping, Handling, Classified Fee Plans, Client Referral Fee, Cancellation Fee, and Payment Plan Surcharge.
- **Quick Register: Settings and UI Updates**: The Quick Register settings have been improved for better clarity and usability. Here are the key updates:
    - **Relocated Settings:** As these settings relate to your shopping cart's functionality, we have moved them to the Shopping Cart Settings. The previous location includes a link to the new area where you can find these settings.
    - **Confirmation Pop-Up**: The confirmation pop-up has been removed. Users will now be directed either to the viewer or their account page, depending on the product type. If a user attempts to access a product they cannot access—such as trying to view a Webcast 30 days before the event—a separate editable alert message will appear, guiding the user to test their system. You can find this message in the settings under the "Quick Launch Alert Message".
    - **Button and Message Customization**: A new section lets you edit the labels for the Register, Launch, and View in Account buttons, as well as the Quick Launch alert message for Live Webcasts, Webinars, and Replays.
    - **Updated Button Behavior**: We have updated the buttons to operate the same, based on if the user is registered or not, and whether or not the product has a launcher or viewer.
        - Users who are not registered: See **"Register"** for all product types.

    - Registered users on a product with a viewer or other launcher: See **"Launch"**.
    - Registered users without anything to launch: See "**View in Account**".
- When assigning products from the **Unassigned Products tab**, purchasers can now complete registrant details, such as question sets or agenda items, through a pop-up registration window similar to the shopping cart flow.
  - This ensures all agenda items and registrant question sets are captured, triggering the appropriate emails and updating product registrant lists.
  - Additionally, the Assign a Product modal has been updated for a cleaner layout: it now uses 90% of the viewport height for better visibility, and the spacing of the "Remove User (X)" icon has been tightened for a more balanced, polished appearance.
- **Add-On products** now appear on both the Product Details Page and the Add to Cart pop-up, regardless of previous purchases by logged-in users.
  - Users can purchase Add-Ons for others during checkout, while restrictions for the logged-in user remain, displaying error messages if they try to buy Add-Ons they already own.
  - Existing rules still apply, including requiring the original product or limiting purchases to matching registrants, ensuring flexibility for multi-user purchases, and preventing duplicates for the same user.
- **Uploaded files in Registrant Question sets** now appear consistently across the platform:
  - **Order Details & Registrant Table**: Clickable links show all uploaded files for each registrant.
  - **Registration & Completion Reports**: "Registrant Type Answers" column includes links to uploaded files, with multiple files separated by commas.
  - **Bulk Export (in Product Information tab)**: Exported reports include full URLs for all uploaded files.
- When **swapping products** in an order, price adjustments, discounts, reward points, and taxes are now calculated correctly for the new product. Global discounts and reward points are applied based on the new product's subtotal. Price adjustments and cash discounts are independent and are not transferred. Customers see clear warnings if the new product's total differs from the original and which reward points were applied.
- The **refund workflow** has been revised for improved clarity and usability:
  - **Full Refund Column**: The checkbox and information bubble previously found in the "Refund Cancellation Fee" column have now been relocated here. When the checkbox is selected, a full refund will be applied to all line items, and the cancellation fee will be automatically populated (staff can edit this amount). The text in the information bubble has been updated for better guidance.
  - **Cancellation Fee Column**: This column has been renamed from "Refund Cancellation Fee" to "Default Fee: ($Amount)" and is now displayed in red, left-aligned.
  - Products are now correctly deactivated when a refund is processed for orders paid entirely with reward points.
- All **mini cart pop-ups now include a 'Name on Card'** field whenever a credit card is selected. This required field is consistently present across Catalog and Manager flows. The billing name entered will be sent to e-commerce providers to prevent errors during payment processing, ensuring successful transactions with providers like Authorize.Net.
- You can **no longer create orders** in Manager for Live Events, Webcasts, Video Replays, Virtual Summits, Dated Classrooms or Webinars **if no event date is set**, preventing errors and ensuring proper scheduling and certification.
- **Touchnet updates**:
  - Order details no longer show duplicate payments when using the Touchnet processor. Previously, entering card details twice caused duplicate entries, but customers were never double-charged. Affected orders in production have been corrected.
  - An issue where successful Touchnet transactions were incorrectly marked as failed due to timeouts has been addressed. The timeout period has been increased, and error messages now

display the actual Touchnet response instead of a generic message. This makes it clearer to staff and customers when a transaction times out.

Smart Lists

- You can now include **custom address blocks in Smart List** results via the Custom Fields accordion in the column chooser. Addresses will include Address Line 1, 2 & 3, City, State, Zip, Country, and County (if configured).

Viewer

- The "Logo Bug" label has been changed to "**Watermark**," and when a viewer has the watermark enabled, new products using that viewer will now automatically inherit it as expected.
- Fixed an issue in the **Live Webcast viewer** where **slides** set to show or hide at specific times using markers sometimes displayed incorrectly at the start or stayed visible after being turned off. This update ensures slide markers trigger reliably, even in edge cases where marker times overlap or are very close together.
- Fixed an issue where time tracking was automatically marked while the **archive video was being encoded.**
- Fixed a rare issue in On-Demand videos on mobile devices where videos would restart from the beginning and prevent skipping forward. Users can now resume playback from where they left off.
- Launching a **Video Replay seminar "as if starting now"** now correctly plays pre-seminar media leading into the replay. Previously, the viewer would briefly load and then display a Play button without starting the media. This fix ensures attendees see the last segment of pre-seminar videos smoothly before the seminar begins.