New Features and Updates for the (26.01) Release

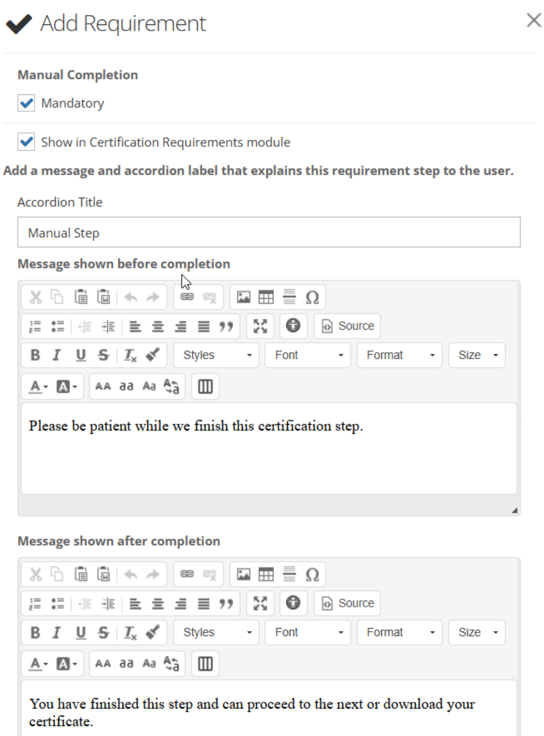
If you have any questions about this release's features or functionality, please submit your comment or question via the Help Bucket in the Manager, and a CE21 Team Member will contact you.

Catalog Appearance

- We updated the **Featured Product widget** to display speakers, as in other product widgets, shortening long lists with ellipses rather than listing all speakers.
- The shopping cart has been updated so users can always click the cart icon to access it or use the Add to Cart button, which now appears at the top of the product list that pops up when you click the cart.

Certificate Requirements

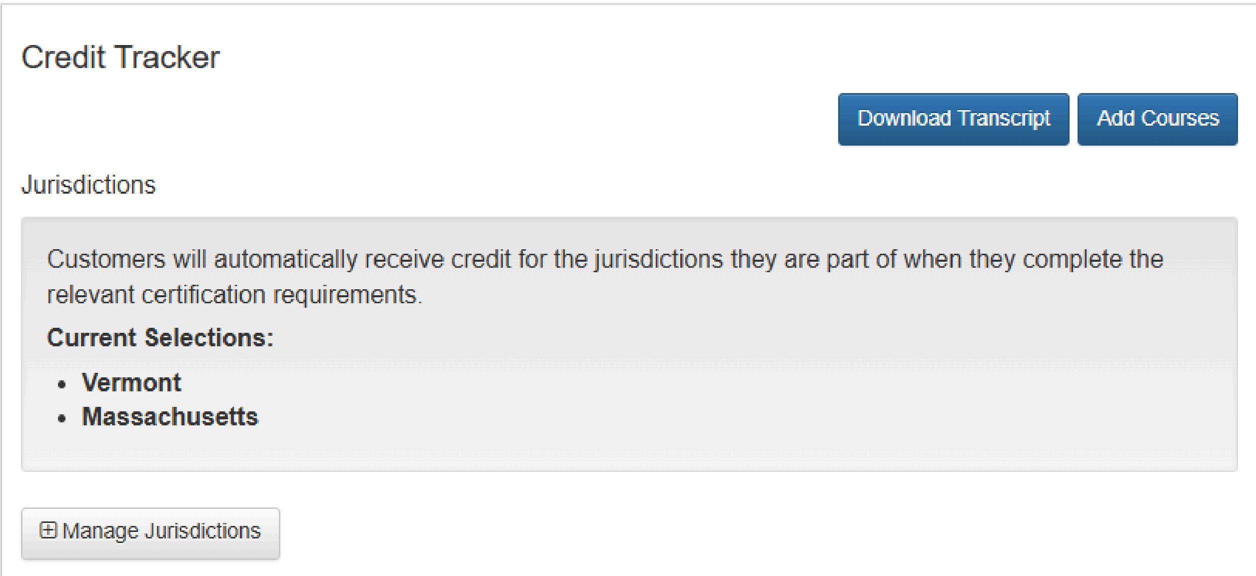
- For all products that use the **"Manual Completion" Certificate Requirement**, we have enhanced the feature to allow you to provide more information to your users while you manage that step in the certification process. You can now show that in the certificate popup, in an optional, configurable accordion with two separate messages for learners, shown before or after that step is complete.



- Fixed an issue where **Address blocks** were not properly populating for **message tokens** in the Certificate.

Credits

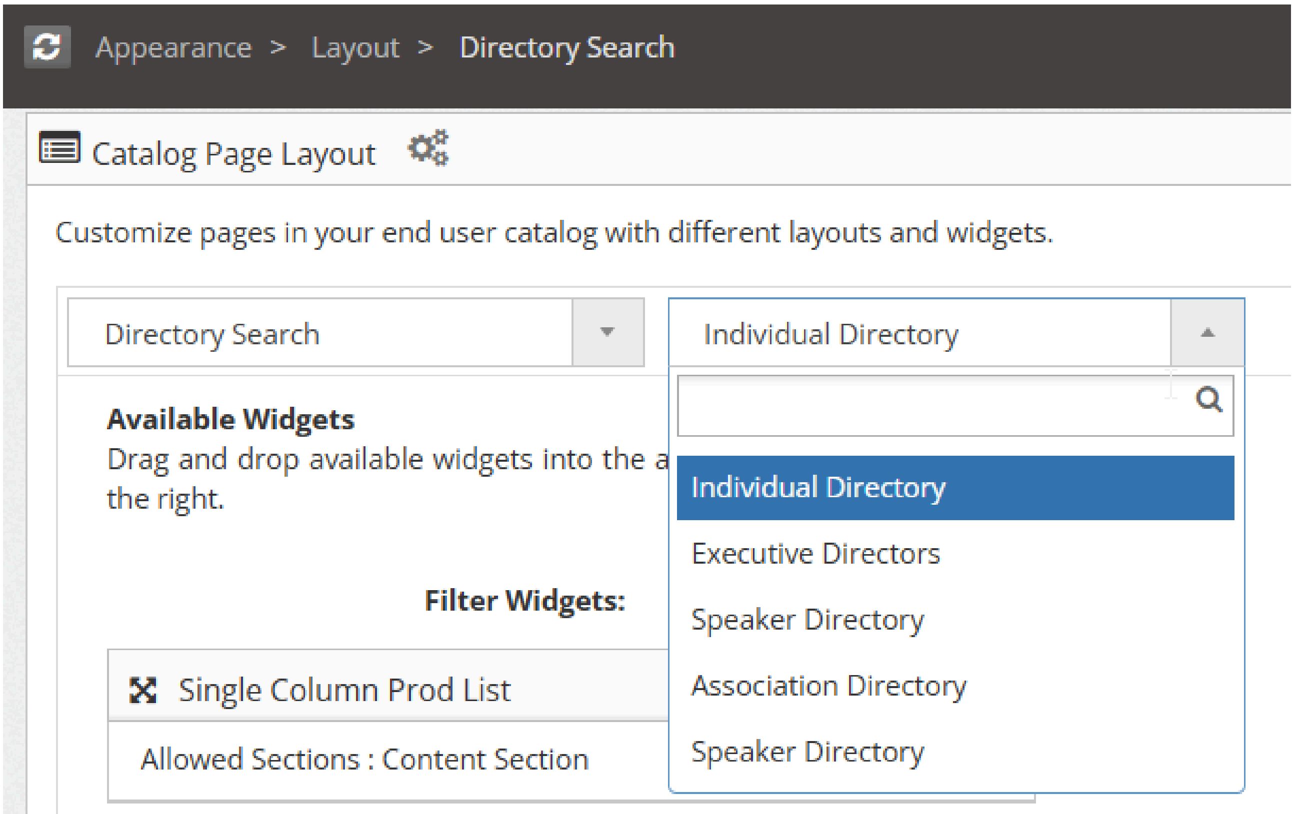
- To accommodate updates related to our PARS integration, we have made several changes to how **Jurisdictions** work in our system. If you are not currently using the Jurisdiction method for credit management, the following information will not apply to you.
    - Within the **Standard Customer Settings**, you can now use a Jurisdiction field to streamline account creation, profile editing, and viewing in Manager. If you turn this one, your users can select their jurisdiction when creating their account so that when they complete their first program, the correct Jurisdiction is automatically selected.
        - The Jurisdictions displayed to the user in their account are based on the list you have created in the Credit Types list. You do not need to create a separate list of jurisdictions for users to select from.
    - If you also have the **Credit Tracker** enabled in your catalog, users will see the **Jurisdiction management** tool there. This tool will be visible in the Credit Tracker, regardless of whether the Customer Setting is enabled or not. The Jurisdiction selection area will appear at the top of the tool, allowing users to view or update their Jurisdiction.



    - Any changes made using this new Jurisdiction management tool will only affect future course completions.
    - If a user does not make any changes using this Jurisdiction management tool, we will continue to manage the pre-selection of Jurisdiction on their certificate modal as we have always done, based on their most recent selection.

Directory

- You can now separately edit your **Directory Search and Directory Details pages using the tools under Appearance > Layout**. Once you select a directory page, a second dropdown menu will appear, displaying all the directories you've created, including both Individual and Company directories.



- Directory profiles for **members who are no longer active now automatically include a noindex, nofollow tag**, ensuring that inactive or ended memberships are removed from search engine results while keeping the page accessible if visited directly. Active member profiles remain fully indexable.
- Fixed an issue where member directory addresses could be hidden even when selected, adding validation to ensure only complete addresses can be marked and reliably displayed in directories.

Donations

- Donation payments made via the "Try Again" button now route to the correct process (**if the processor was changed after the failed order**), and appear correctly in the user's Donation tab.

Email Marketing

- **Email Categories can now be archived** using the eyeball icon found in the tool column. Once archived, these categories cannot be utilized in new campaigns, and a note will appear in red italics on the category page. Categories can only be archived if there are no active campaigns (Draft, Scheduled, or Partially Sent) associated with them. If active campaigns are present, a warning will list them and inform you of the restriction.
- The **Global Media modal in Email Campaign Templates** now correctly displays images with transparent backgrounds by adding a white background behind them, improving preview and selection.

Integrations

- CE21 is now **integrated with PARS**. To learn more about this or be integrated into their services, please open a help bucket ticket to start the inquiry.
- Two new customer **notification emails were added for the PARS/JAPARS integration**: "PARS/JAPARS Credit Granted" (sent when credit is awarded and certificates become available)

and “PARS/JAPARS Credit Rejected” (sent when the board denies credit). These templates are visible and used only when PARS Integration is enabled.
- We’ve **updated our USPS integration to use the new USPS v3** APIs ahead of the January 2026 retirement of USPS Web Tools. ZIP+4 is now sourced from Google, and we’ve already moved everyone to the new service.

Live Events

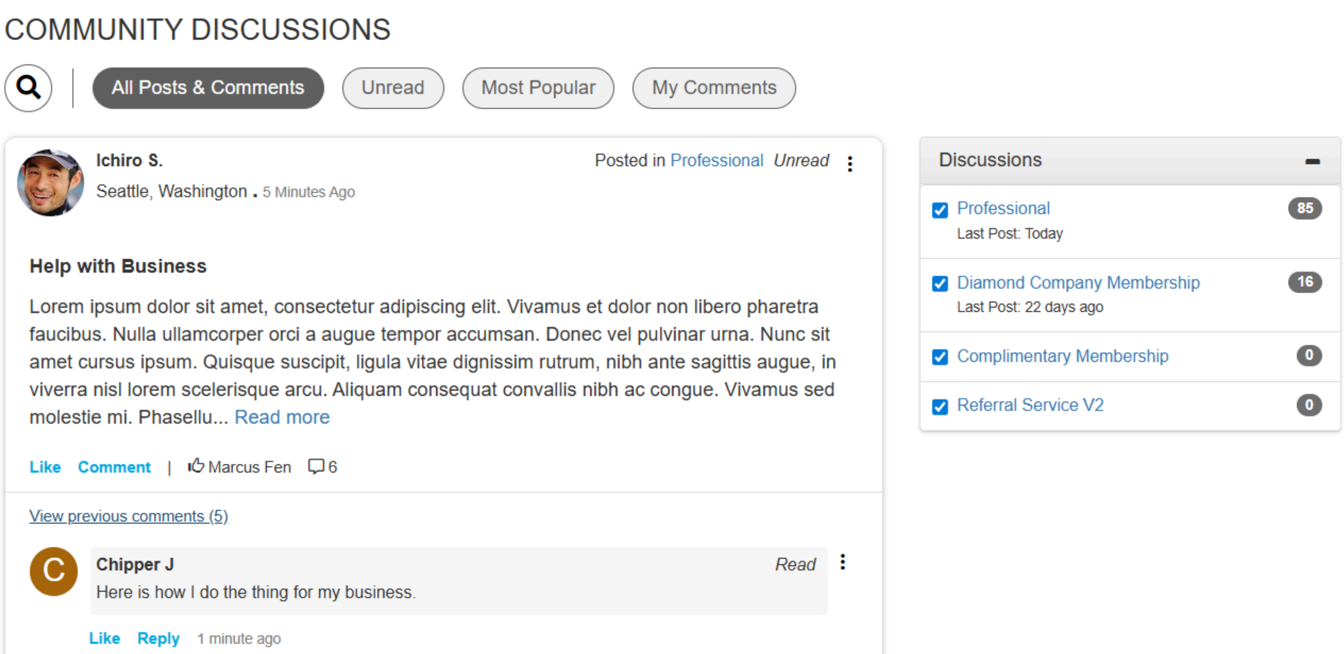
- The **Registrant-Type Specific Badge** feature is now available for all live events on the platform. You can assign badges based on registrant type without accessing the Event Portal or its QR code functionality.
- **Agenda attendance imports** now allow registrants with pending orders (e.g., Pending Check, PO, ACH, Pay Later) to be marked complete. Certificates remain inaccessible until payment is made in full.
- Fixed an issue in the Event Portal Attendance Tracker where multi-day live events showed incorrect weekday labels due to a time zone offset.
- **Live Event programs with Time Tracking** were updated so certificate completion now syncs correctly without requiring users or staff to open certificates to manually trigger completion.

Manager/Settings

- We have added an **audit log to the Reward Points** tools to track changes made there.
- Some of you may have experienced **alerts in Manager** not staying gone after you close them. We have now corrected that, and apologize for the inconvenience!
- To better distinguish between our referral tools, the existing reward-point-based referral feature has been renamed **Customer Referral Program**. This program allows customers to refer friends to your catalog in exchange for reward points and can be found in the Marketing menu.

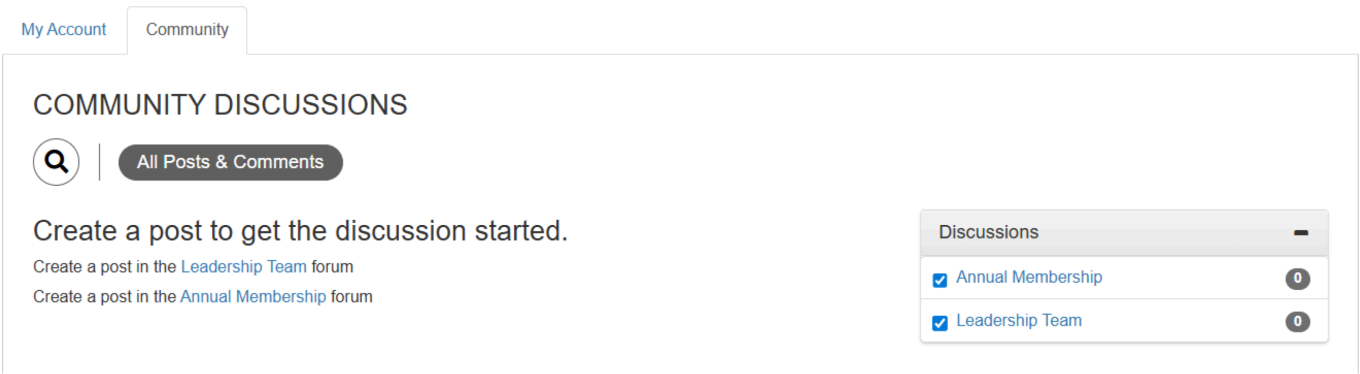
Memberships

- We made many updates to the Forum found in the **Group-based Community Tab** in the user’s Account on the catalog



  - **Post Title:** You can now add a bold title to every forum post using the new “Post Title” field. This is shown in the image above in bold above the text of the post.

  - **Hyperlinked Group Titles:** Click a group title in the discussions sidebar to go directly to that forum in the group portal.
  - **Post Preview:** Community page posts now display a short preview (up to 400 characters) with a "Read more" link to the full post.
  - **Unread & Most Popular Filters:** Easily filter posts by Unread (posts you haven't read yet) or Most Popular (sorted by likes, comments, and replies). You can also mark posts as Read/Unread directly from the three-dot menu.
  - **Default Sort Updated:** Posts with the most recent comments or replies now appear at the top of the community page.
  - **Comment Counts:** The number of comments now appears in parentheses next to View previous comments.
  - **First-Time Posts Simplified:** For group forums with no posts yet, members will now see a way to create a post from the Community tab to get the conversation started. They no longer need to visit the forum tab in the group portal to start a post.



- Staff can now easily **adjust renewal prices for child groups** in three ways which provides more flexibility in managing child group dues while maintaining parent group settings.
  - Individually on a member's Customer Details > Membership tab in Manager.
  - From the Add/Edit Membership Group > Members tab.
  - In bulk through Add/Edit Membership Group > Members > Bulk Operations.
- **Group Library upload update:** You can now upload files up to 100MB and share images directly in .jpg, .jpeg, .png, .gif, .bmp, .tiff, and .webp formats, in addition to .pdf and .zip files.
- **Company-Based Memberships now count the Membership Owner** among employees and list the owner separately in the Manage Employees tool. The owner appears at the top with a dedicated header and can be transferred using the same tool, reducing confusion about employee counts.
- The **Add to Group dropdown** on the Membership tab in a user's account will now scroll fully, allowing access to all groups regardless of how many exist.
- **Invoices for free groups will now be automatically marked as Paid** upon generation. This prevents unnecessary payment reminders and keeps Accounts Receivable reports accurate without manual intervention.
- When a member's status is set to **Member Cancelled, renewal reminder** emails stop, ensuring communications are sent only to active members.
- **Import Members** now handles incomplete membership **Member Since Dates** properly and ensures that **child groups can't be added without a parent**, keeping your data accurate and clean.
- Memberships or fee plans added to the shopping cart through the "Join and Buy" feature will be removed from pending carts if the associated product is hidden or deactivated. This guarantees that these memberships or fee plans cannot be purchased later.
- Added missing Group Renewal Reminders/Confirmation 9 and 10 templates to the Renewal Reminder email options in the Communications tab.

Notifications

- **Emails sent to alert users when their Credit Cards will expire**
  - Removed an obsolete credit card expiration email template that caused confusion during setup.
  - We introduced **three new email templates that notify members, donors, and classified ad fee posters when their payment cards are about to expire**. These notifications are automatically sent 7 days prior to expiration and require no setup. The templates are named: Membership Card Expiring, Donation Card Expiring, and Classified Ad Card Expiring.
  - We clarified the description of the active **Payment Plan Credit Card expiration** email template to indicate that it is for product payment plans and is sent automatically.
- The password reset process now prevents multiple emails or SMS messages from being sent if a **user clicks "Send Code" multiple times**. Users will receive only one message per request, even during slow network or server responses.

Products

- The **Additional CE Participant** pricing logic has been updated:
  - **Non-dated products**, such as on-demand courses, downloads, DVDs, books, eBooks, SCORM, and other digital or physical items, will now have participant availability based on the product's deactivation or unpublish date. The "Additional CE Participant Price Availability" dropdown has been removed
  - **For dated products**, including webinars, live classrooms, and virtual summits, the dropdown menu will still be used to determine the duration for additional participant registration based on the event's start date. An information bubble has been added for clarification.
  - Removed this feature for Live Events and Replays
- In the information tab, you can now **schedule emails for products even if no registrants have been added yet**. Previously, the scheduling buttons were disabled until the first registrant was present.

Classroom and Virtual Summit Updates

- The **Forum and Chat Manager tools for Virtual Summits and Classrooms** now display all eligible pages, exhibitors, and products by default, simplifying feature management from a single interface. Admins can enable forums or chats directly in these tools, which automatically generate the required components with default settings, eliminating the need to navigate multiple setup areas. This update streamlines setup, reduces repetitive steps, and makes managing complex events more efficient.
- For Classrooms or Virtual Summits with **disable launch in place**, you can now see the exact date and time when a course or tab becomes available in the product in Manager, giving staff a clearer view of availability.
- For Classroom or Virtual Summit products with **Guestbook registration and Disable Launch being used**, registrants will now see a confirmation message directly on the guestbook page after entering their email. The confirmation message will no longer redirect users to the product details page, reducing confusion and providing immediate feedback.
- **eBook subtitles** now display alongside the title in Classrooms and Virtual Summits with a Course Schedule tab. This ensures the Title: Subtitle format appears correctly wherever the Module Title column is used.
- Moderators with direct chat access in Virtual Summit chats or Classrooms will now see the **Launch Chat button**, just as they do for individual products in My List.

Reports

- The **Product Sales Report now includes an "Is Speaker"** column that indicates whether the person in each row is a speaker for that program (True) or not (False). This helps clearly distinguish speaker registrations from standard registrations in sales reporting.
- The R**egistration and Completion reports** now retain your choices for **"Show individual Classroom components" and "Show individual Agenda items (Complex Live Events)"** using your last selection. These settings are stored locally in your browser, so they might reset if your browser cache is cleared. Also, "Show individual Classroom components" is now unchecked by default to better suit typical reporting requirements.
- The **Sales Report with Daily Totals has been discontinued** and is no longer part of our standard reports as we move toward new business intelligence-based reports. Any versions you previously saved are still accessible. We recommend using the Product Sales Report or the Transaction Report for your current sales reporting needs.
- The **Registration Report now accurately shows Total Credit Earned**: it leaves the column blank for registrants who haven't completed a course and displays the earned credit amount for those who have.

Sales

- We have improved the **Registrant Question Sets checkout process** to make registrant assignment clearer, faster, and less error-prone across Catalog and Manager. We've streamlined requests for registrant information to reduce confusion, especially when registering others.
  - The **'Request Info From Registrant'** action now appears at the top of the question set for visibility.
  - In cases where it's clear a different person is being registered (like assign-later flows or confirmation), **unnecessary checkboxes are removed.**
  - In orders created on Manager, staff can now easily choose to request info or bypass it, both at the top.
- **Authorize.net Payment Fix:** Addresses over 60 characters no longer block payments. Long addresses are truncated, and additional error handling ensures transactions complete successfully.
- **Discounts requiring a minimum purchase amount** now accurately exclude products labeled as excluded when determining eligibility. Only eligible products contribute to the minimum requirement, and unstackable discounts no longer combine with unstackable price adjustments.
- **Distributed products** now correctly inherit the "Allow users to purchase products within this same product family" and "Multiple Purchases for Single User" settings from the producer. Updates to these settings in the producer product automatically propagate to all distributed products, ensuring consistent site messages and purchase behavior.
  - **Sharing Marketplace** courses do not support the multiple-purchase setting, and no changes have been made to that behavior at this time.
- The **"Build Your Own Bundle"** Order Summary now correctly calculates totals when CE Credit is included.
- User **expiration dates now update correctly for all orders, including Pending Check, PO, ACH, or Pay Later**, when an archive is added, a bulk update is run, or the product expiration is changed, while still respecting access and credit rules.
- The Email Invoice tool in **Sales > Invoicing now correctly respects group and account tag filters**, ensuring that members receive only invoices for the groups they belong to.
- Fixed an issue where **non-stacking price adjustments** were still receiving global discounts.

Viewer

- **Forum comments in Viewer sessions** now remain intact while the viewer is typing, even if others post at the same time. New messages appear immediately after submitting the comment or reply, preventing lost replies and improving real-time engagement.
- **Pre-Roll and Post-Roll Video Updates for Distributed and Shared Courses**: To improve visibility and control over the videos shown before or after your courses during distribution or sharing, we have clarified the functionality of pre-roll and post-roll.
    - **Distributed Products** (where you manage multiple catalogs and push content into other catalogs): The producer's selected videos will appear in the downstream Viewer Settings. You can either keep these selections or override them with your own. Note that producer updates will only sync downstream if you have not made any changes to the selections.
    - **Shared Products** (using the Sharing Marketplace): Pre-roll and post-roll videos from the producer who is sharing the course will not be displayed. You can choose any of your own videos, and no changes will be synced between the two sites.
- The **View Demo viewer** now correctly shows the Original Program Date in the Information tab.