

RELEASE
26.02



UPDATES + RELEASE NOTES

New Features and Updates for the (26.02) 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 have made **important accessibility improvements** to enhance the experience for users of screen readers and assistive technologies. These updates focus on better labeling, improved navigation, and **ADA compliance**, demonstrating our commitment to inclusivity for all community members.
- **Single Sign-On Integrations:** To ensure that user profile information, such as addresses and membership status, remains synchronized when using CE21 with external AMS systems, we have implemented a mandatory daily session reset. For catalogs utilizing Single Sign-On (SSO) or login redirects, the system will automatically log users out at 2:00 AM local time. This process guarantees that when users log back in the following day, their data is fully refreshed from your AMS without disrupting their active sessions.
- **Shopping Cart and Address Blocks:** We have simplified the address selection process to make checkout more intuitive. The layout of address blocks in the Shopping Cart and Catalog has been refined to reduce spacing and clarify "required field" alerts.
- **Shopping Cart + Multi-Registrant:** We have improved the multi-registrant workflow to ensure that accurate pricing is displayed at the right time.
 - The "Change Price" pop-up now waits for all required registrant fields, including company details, to be completed before appearing, ensuring accurate Company-Based Membership rates before prompting price selection.
 - We have enabled the "Change Price" feature for the primary registrant. They can now easily see and switch to better rates, like member prices, as soon as their information is entered.
- We improved the searchability of **Product Attributes** that are set to display and can be searched in the catalog.
- We've added **audit logs to your Appearance pages** (Layout, Menus, and Custom Pages) showing who made changes and when.
- **Catalog Appearance > Header and Footer:** When reverting headers or footers, you'll now see the staff member's name for better team coordination.
- We've standardized program display on your **speaker pages** to follow a chronological "Upcoming Events" order, with upcoming sessions at the top and past events in reverse order.
- We resolved an issue in which special characters (such as "&") in a venue's name were **breaking the Google Maps link on the Catalog and User Account pages**. While the maps were loading fine on the product details page, they are now fully functional across the entire site, ensuring your attendees can always find their way to the event.
- We resolved an issue in which Classroom and Virtual Summit webinar times appeared incorrectly in Outlook and iCalendar. By standardizing the time format sent to these apps, we've ensured session times now display accurately for all attendees.

Certificate Requirements

- Email Update: You can now select the **"Certificate Available" email template** when setting up an "After Completion" reminder rule. This makes it easier than ever to automatically celebrate your users' success and deliver their credentials the moment they finish a program.
- We made a few updates to the way **Quizzes** work in some edge cases.
 - **Neutral Start:** Quiz questions using dropdown tools (5-point, 10-point, or multiple-choice) will no longer have a pre-selected value, ensuring every user response is intentional.
 - **Staff-Friendly Previews:** Opening a quiz via the Customer Account in Manager will no longer trigger the quiz timer or count as an official attempt, allowing your team to troubleshoot without affecting data.
 - **Comprehensive Completion:** The "Mark Complete" tool in Manager has been updated to correctly handle questions with multiple correct answers, ensuring all required selections are made so the quiz can be successfully finalized.
- We fixed a technical issue where images from **Global Media** occasionally lacked the "https" prefix in their URLs, preventing proper loading in downloaded documents. Our team updated all affected records to ensure that every certificate and document remained functional.
- We've resolved an issue that was preventing your product credits from displaying correctly on the More Information link in the user's account product preview.

Classified Ads

- We have upgraded the **Classified Ad Fee Plan notifications** to allow any email address, such as shared inboxes or non-staff accounts, to receive alerts for submissions and edits. This change prevents your team from missing postings due to account limitations. Set this in the classified Fee Plan.
- We resolved an issue where editing a new classified ad during the initial confirmation process would occasionally create a duplicate entry instead of saving your changes.

Directory

- We've replaced the generic **"Directory Details" buttons with standard social media icons** across your member directories to ensure a consistent, modern look that matches the rest of your site. This update simplifies your settings and provides a more intuitive navigation experience for your visitors to your directory.

Email Marketing

- We've improved the **Email Template builder with clearer labels and better-organized settings** to make your design process easier. By replacing technical terms (like "Href" and "Rel") with simpler ones (like "Link" and "Alt Text") and prioritizing options by importance, we've made it simpler than ever to create accessible, professional emails without the guesswork.
- When creating an email campaign, you are now prompted to **confirm before clicking Send Now**, which helps prevent accidental sends.
 - The Send and Save buttons also feature icons for clearer visual distinction.
- We have updated the Email Marketing tool to utilize the full height of your browser window.

Live Events

- **We have made an important change to the language!** To enhance clarity, we have updated three requirements for Live Event certificates to better describe their purpose.

- "Live Event Attendance" relabeled to "Overall Attendance"
- "Customer Attendance Confirmation" relabeled to "Customer Agenda Attendance"
- "Agenda Attendance Confirmation" relabeled to "Staff Agenda Attendance".

Marketing > Reward Points

- We have improved how **reward points are distributed for multi-item orders** to ensure more accurate sales and faculty reports. Instead of "zeroing out" the lowest-priced items first, reward points are now shared proportionally among all products in the cart. This guarantees that each program reflects its fair share of the sale, prevents issues with speaker payouts later, and provides a clearer view of product value in your reports.
- We fixed a calculation mistake in which negative reward point adjustments (used to subtract points) were assigned expiration dates.

Memberships

- We have added the **Tax Schema field to the Groups setup**, allowing you to charge sales tax on specific memberships. This field is located directly under the GL Codes area in the group settings, providing the same tax configuration flexibility you currently have for products.
- We've introduced an **automated notification to alert staff when a member cancels** their membership. This email includes the member's name, group, cancellation date, and a link to their invoices for quick reference. You can manage this notification for each group in the Communications tab.
- We've refined our automated suspension logic to ensure that **account status changes** (like moving from Active to Lapsed) are accurately recorded with **clear account notes**.
- We've corrected a background issue to ensure suspension notification emails are sent to the correct recipients with the proper tenant branding.
- We resolved an issue where **membership renewals weren't accounting for child group selections**, ensuring your dues are now calculated accurately based on your current setup.
- We resolved an issue where **company-based membership +fixed-cost-per-employee** pricing didn't update correctly after a rate change, ensuring that all renewal invoices now reflect your current membership configuration rather than legacy charges.
- We resolved an issue where **"Better Price" alerts** were incorrectly appearing for items already priced at zero dollars, ensuring that members seeing the best available rate no longer receive unnecessary price notifications when using the search widget or product pages.
- We have updated our membership logic to **prevent outdated or manual invoices from the previous year** from incorrectly rolling over when a member switches to a new group. This ensures your renewal invoices remain accurate and reflect only the specific pricing and terms of the current membership cycle.

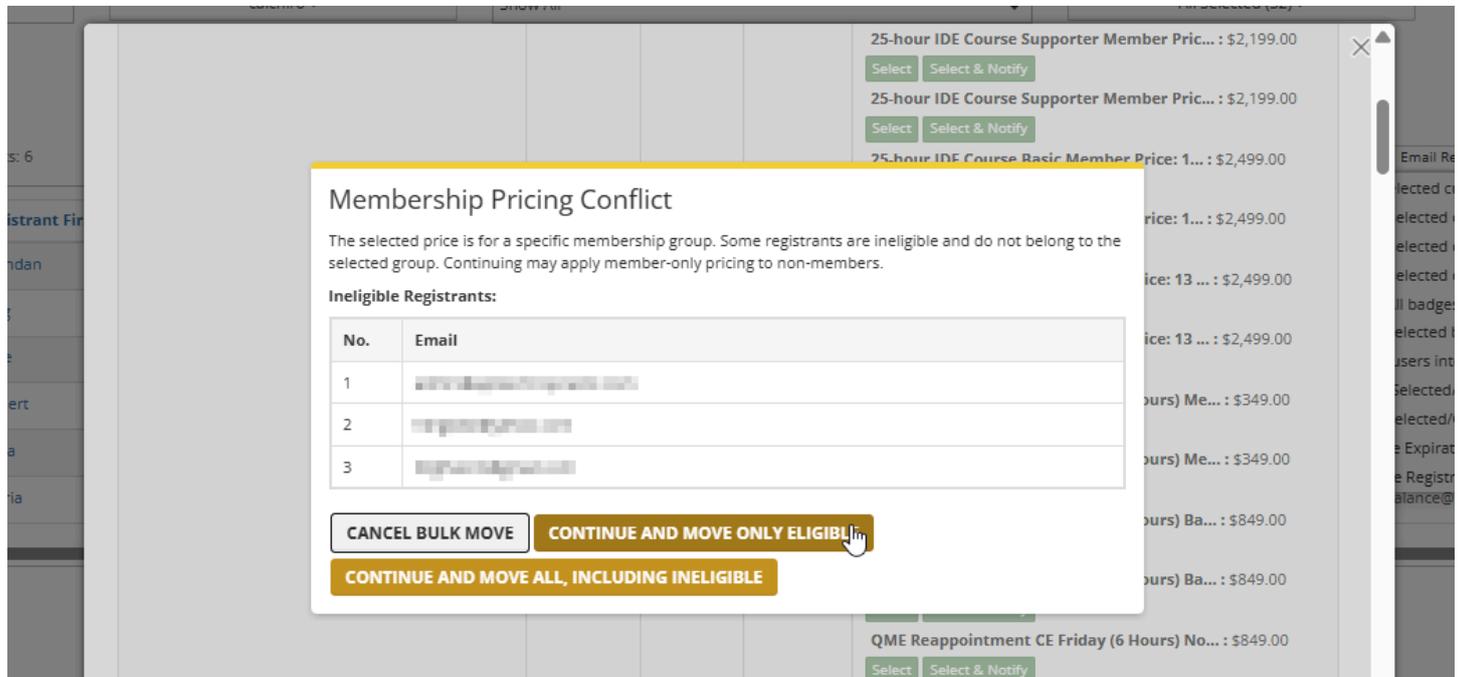
Notifications

- We've introduced two **new message tokens** to help you communicate **Cash Discount** savings across your platform. These are now integrated into all major email templates, invoice builders, and statement templates. Those tokens are:
 - **{CashDiscountPercent}**: Displays the discount percentage (e.g., 3%).
 - **{CashDiscountAmount}**: Calculates the specific savings amount in the local currency (e.g., \$3.60).
- We improved how **purchase alerts work for bundled products**, ensuring alerts now display correctly even if only a single item in the bundle has an alert configured, so your customers will always see important notifications during checkout, regardless of the bundle's structure.

- We resolved an issue where links in **forum post emails** displayed with raw HTML, ensuring that shared URLs and link previews now appear clean and professional for all recipients.

Products

- **Bulk Move Registrants within the product registrant list:** We have implemented essential safety checks in the Bulk Move Registrant tool to prevent accidental data loss and maintain pricing integrity when transferring users between products, while providing you with the flexibility to move users as needed.



- **Data Loss Protection:** The system now identifies if registrants have existing agenda selections or registrant type question responses. If detected, a warning will block the move until you confirm that you are okay with removing that data.
- **Membership Pricing Alerts:** To prevent non-members from accidentally receiving restricted rates, the tool now checks membership eligibility. If a conflict is identified, you'll see a list of ineligible registrants and can choose to exclude them from the move.
- **Improved Audit Trail:** Every bulk move now generates an automatic entry in the Order History table, documenting which staff member performed the swap for better internal tracking and troubleshooting.
- Fixed a defect where editing **credits in the General Information** tab was not properly updating existing credits.
- We have improved the product **cloning process so that SEO titles** are automatically regenerated based on the new product's name.
- **Virtual Summits AND Classrooms:** We've overhauled the **speaker management** system to deliver a seamless, synchronized experience across both Classroom and Virtual Summit. This update automates the heavy lifting of managing faculty data, ensuring that when you add or remove a speaker from a module, your product pages, evaluations, and reporting data stay perfectly in sync without manual intervention.
 - **Automated Synchronization:** Adding a speaker to a specific module automatically updates the Faculty tab, Speaker tab, product widgets, and associated evaluations.
 - **Smart Deletion Logic:** The system now conducts a background check before removing a speaker to prevent data gaps. If the speaker is still associated with another module within the same program, their information will remain consistent across all relevant areas.

- **Staff Guardrails:** When manually removing an active speaker from a module, a helpful alert indicates which modules they are linked to, preventing accidental deletions.
- **Moderation Continuity:** Moderator permissions for chats and forums will remain active even if a speaker is removed from the faculty list, allowing staff to manage access independently.
- **Accurate Reporting:** Faculty lists are now unified across all areas, ensuring your Registration, Sales, and Completion reports accurately reflect every speaker associated with your content.
- **Virtual Summits:** We've corrected a behavior where **embedded videos** would automatically resume playback when switching between tabs, ensuring they now remain paused until you choose to hit play.
- **Virtual Summits:** We've refined the "Hide the timer after expiration" setting in the **Countdown widget** to ensure your page remains clean and professional. Now, when the countdown timer expires and hides, the associated header section will automatically disappear along with it, removing any empty or outdated content.
- **Virtual Summits:** We've updated the **VC Themes footer** to replace the hardcoded year with the **{CurrentYear}** token. Your copyright date will now update automatically every year, eliminating the need to manually duplicate or edit themes to keep your branding current.
- **Manual Webinar:** We've overhauled the workflow for Manual Webinar services to give you more flexibility and reduce unnecessary steps. For example, you can now reserve or update manual webinar links at any point without being forced to release the reservation to change dates or times.
- **Webinar:** We've introduced an automated "Safety Net" email system to prevent last-minute webinar access issues. The system now identifies upcoming webinar events **missing a reserved webinar service and alerts your staff** so they can fix the connection before attendees log in.
 - **Timely Reminders:** Automated warnings sent 72 and 24 hours before event start times.
 - **Smart Filtering:** Only sends emails for active, published events with real registrants.
 - **Actionable Guidance:** Emails include direct edit links and clear instructions to fix your webinar.
- **Zoom Webinar:** We resolved an issue where some registrations were not automatically syncing to Zoom after an order was placed. We also updated existing records to ensure all current registrants are correctly identified in Zoom ahead of their scheduled sessions.
- **"Other Product Type:** To ensure your products always display correctly in the catalog, we've added a safeguard for **"Other" digital and physical product types**. You will now be prompted to select a media type before a product can be published, which prevents display errors caused by missing information. If you try to publish without this selection, the system will highlight the required field in red and automatically scroll to it for a quick fix.
- **"Other Product Type:** We've expanded the **enhanced "Email Send To" options** to include all product types, including **Other Digital and Other Physical** products.

Referral Services

- We've improved the **"Pause Referrals" feature** for professionals, providing clearer communication tools and automated tracking to better manage temporary service breaks.
 - **Guided Pausing:** New information bubbles and alert banners in both Manager and My Account clearly explain how pausing impacts referral assignments during vacations or busy periods.
 - **Automated Notifications:** The system now sends instant email alerts to staff when a professional pauses or resumes their service, including key details such as the start and scheduled resume dates.
 - **Easy Configuration:** Shortcuts in the settings enable quick access to customize "Referrals Paused" email templates and site messages.
 - **Improved Record Keeping:** To keep your history clean, the system now automatically logs a note in the professional's account whenever the pause toggle is used, replacing the technical audit log with clear, readable updates.

- For professionals who want to send a referral back, we have enhanced the **"Referred Back" workflow** to ensure staff can take immediate action when a professional returns a referral.
 - **Real-Time Staff Alerts:** The system now automatically emails your designated staff whenever a referral status changes to "Referred Back," including a direct link to the case for quick processing.
 - **Visual Dashboard Reminders:** A new yellow alert banner on the Referrals landing page highlights pending returns, with the view pre-filtered to show only those cases for easier management.
- **NEW Referral Detail Report:** We've introduced a comprehensive Referral Detail Report that serves as a **full audit log for your referral ecosystem**, providing total transparency into every change and financial update.

Referral Detail Report Choose Columns Schedule Report Save Report Export Excl

Select Date Type: Activity Date | Date From: 10/01/2025 | Date To: 03/10/2026 | Activity Type: None Selected | Practice Areas: None Selected | Page Value: 25 Search

Professional Search: Enter a professional's name or email address. | Client Search: Enter a client's name or email address.

Activity Date	Activity Type	Referral Fees Due	Referral Fees Paid	Notes	Referral Date	Referral #	Professional	Client	Practice Area	Specialty
09/30/2025 9:22 PM (EDT)	Referral Created				09/30/2025 9:22 PM (EDT)	RS-12345	John Doe	Jane Smith	Criminal Law	
09/30/2025 9:22 PM (EDT)	New Note Added			its not my case but its some one who is being framed for murder	09/30/2025 9:22 PM (EDT)	RS-12345	John Doe	Jane Smith	Criminal Law	
10/01/2025 8:38 AM (EDT)	New Note Added			Matter closed	06/18/2024 10:18 AM (EDT)	RS-12345	John Doe	Jane Smith		
10/01/2025 9:42 AM (EDT)	Referral Created				10/01/2025 9:42 AM (EDT)	RS-12345	John Doe	Jane Smith	Individual Rights	Other Constitutional Law

- **Activity-Based Tracking:** Instead of just seeing the current status, you can now view a complete history of a referral, with new rows automatically generated for status changes, notes, and fee updates.
- **Granular Filtering:** Easily drill down into your data by filtering for specific activity types, date ranges, or individual professionals and clients.
- **Traceable Financials:** Every time a client fee is added or a referral fee is paid, the report captures the exact date, amount, and resulting balance, ensuring your records are always audit-ready.
- **Full Edit History:** To maintain a clean paper trail, any edits or deletions to fees and notes are recorded as new activity entries, keeping your historical data accurate and visible.
- **Consolidated Statements:** You can now generate consolidated statements that group multiple referrals into a single, professional document.
 - **Multi-Referral Templates:** Easily create and manage templates that display a summary of all relevant referrals in one view. These include summary rows that automatically calculate grand totals for referral fees and balances due.
 - **Streamlined Tracking:** A dedicated Templates tab lets you toggle between single and multi-referral formats with ease.

We've updated our bulk operations to give you full control over how referral statements are delivered.
 - **Flexible Sending when Emailing:** Choose between Single or Multi-Referral formats directly from the Email and Print menus.
 - **Template Selection:** Pick your specific statement and email templates on the fly to ensure every communication is perfectly tailored.
 - **Smarter Workflows:** On-screen guidance and automated date range summaries help you verify exactly what you're sending before you hit go.

- Dedicated **email templates for both single and multi-referral statements**. You can now choose between a "Single Referral Statement Email" for individual updates or a **new "Multi-Referral Statement Email"** for consolidated billing.
 - The new multi-referral template includes a dedicated token that pulls your statement table and grand totals directly into the email body
- **Better Catalog view for Professionals** who can now filter their referral history by date and download consolidated multi-referral statements directly from their account.

Reports

- We've launched the [new System Email Delivery Report](#) to give you full visibility into every email sent to your users.

Date / Time Sent	Recipient Type	Email Template	Recipient Email	Customer ID
02/28/2026 6:00 PM (CST)	Customer	Pending Question Set Notification	bdavis+maddog@ce21.com	963662
02/28/2026 10:30 PM (CST)	Customer	Membership SMS Renewal Notification	bdavis+tr@ce21.com	1620843
02/28/2026 11:30 PM (CST)	Customer	Membership Payment Reminder 3	bdavis+nc@ce21.com	496679
03/01/2026 12:30 AM (CST)	Customer	Membership Payment Reminder 2	bdavis+nc@ce21.com	1219245
03/01/2026 12:30 AM (CST)	Customer	Membership Payment Reminder 2	bdavis+nc@ce21.com	1219245
03/01/2026 12:30 AM (CST)	Customer	Membership Payment Reminder 2	bdavis+nc@ce21.com	1219245
03/01/2026 12:30 AM (CST)	Customer	Membership Payment Reminder 2	bdavis+nc@ce21.com	1219245
03/01/2026 12:30 AM (CST)	Customer	Membership Payment Reminder 2	bdavis+mattc18@ce21.com	822449

- **Comprehensive Tracking:** Monitor all system-generated emails, including password resets, order confirmations, and event reminders, in one centralized view.
- **Detailed Delivery Insights:** View the exact timestamp, recipient type, and subject line for every message, along with its current delivery status.
- **Streamlined Filtering:** Quickly audit your communications by filtering by specific months, recipient roles, or message statuses.
- For our AMS clients, we are excited to introduce the [new Group Invoice Activity Report](#), a report designed specifically for auditing and reconciliation. Unlike the standard detail report, this version provides a chronological audit trail of every action taken on an invoice. It includes specific rows for invoice adjustments, date changes, and partial refunds, ensuring your accounting data is accurate and easy to follow.

First Name	Last Name	Email	Activity Date	Activity Type	Invoice Date	Invoice Number	Group	Accounting Class	GL Code	Transaction Amount	Invoice Amount	Payment Amount	Billing Cycle
David	Spading	dspading@seceditors.com	02/07/2025 2:22 PM (EST)	Created	02/07/2026 2:22 PM (EST)	312-16246	2025 Government Attorney 6-9 Years in Practice		5000-01-000	\$0.00	\$0.00		Annually
David	Spading	dspading@seceditors.com	08/06/2025 8:00 PM	Write-Off	02/07/2026 2:22 PM	312-16246 WriteOff	2025 Government		5000-01-000	\$0.00	\$0.00		Annually

- **Complete Activity Tracking:** Includes new **"Adjustment"** rows that capture exact changes to invoice prices and dates.

- **Smarter Refund Logic:** Differentiates between full and partial refunds with clear, negative transaction amounts for easier balancing.
- **Chronological Sorting:** The default view uses activity timestamps, so you can see the lifecycle of an invoice from creation to payment or voiding.
- **Simplified Filters:** Replaced confusing payment status filters with an intuitive "Today's Invoice Status" filter and added a Notes column to capture refund and cancellation reasons.
- We've implemented **speaker filtering for the Product Detail Report across distributed tenants**. You can now create speaker-specific reports directly from your local catalog for distributed products, ensuring that all purchase links point to your tenant's site while preserving full access to distributed speaker data.
- We resolved an issue where some tenants were receiving **duplicate copies of their scheduled reports**.

Sales

- We've enhanced the "**Limit GL Codes to Check/ACH Only**" setting to work more flexibly with your payment configurations. Previously, this safeguard required the "Pay by Check" option to be active in the catalog to function; it now also recognizes and triggers **when ACH is enabled**.
- We've added a clear notification and an automatic safeguard to prevent **credit card refund attempts for orders older than 6 months**. To simplify the process, we recommend your staff use alternative refund methods, such as Check Refund, for these older transactions to avoid confusion.
- We resolved an issue where the "**Charge Difference**" **button** would fail to respond when editing orders with many agenda items.

Viewer

- We've added a "Bypass Alert Message" option to the **Force Reload tool in the Program Viewer**. This allows administrators to force-refresh the viewer for all attendees without displaying a pop-up notification. When this checkbox is enabled, the alert text and duration fields are automatically disabled, ensuring a seamless, "behind-the-scenes" reload.
- We fixed a caching issue that caused **older forum posts to appear on newer video replay dates**.
- Fixed issue with time tracking for **multi-segmented webcasts**.