RELEASE 26.03

CE21

UPDATES + RELEASE NOTES

New Features and Updates for the (26.03) 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

- **Prospect Management Relocation:** The dedicated Prospects page has been moved to enhance navigation and is now accessible directly under the Accounts menu, between Speakers and Companies.
- **Flexible Data Imports:** Prospect importation no longer requires an email address. The system supports import via any personal data, including all custom phone number fields.
- **Smart List Integration:** All imported address and phone number data is now fully searchable and available for segmentation within Smart Lists.
- **Conversion Logic Advisory:** An import tool warning has been implemented to clarify that email remains the primary identifier (key) for automatically converting a Prospect to a full account.

Catalog Interface

- **Forum Attachment Workflow Improvement**: Enhanced the attachment posting experience in all Forums by adding a direct "Attach File" button and eliminating the secondary pop-up, preventing accidental overwriting of post content.
- **Engagement Optimization:** Post, Like, and Comment buttons are now persistently visible across Product, Viewer, and Community forums to boost user engagement and remove unnecessary refresh cycles.
- **Search 2.0 Resolution**: Fixed a bug in Search 2.0 that displayed irrelevant products due to a value-matching error in the Topic Areas filter.

Certificate Requirements

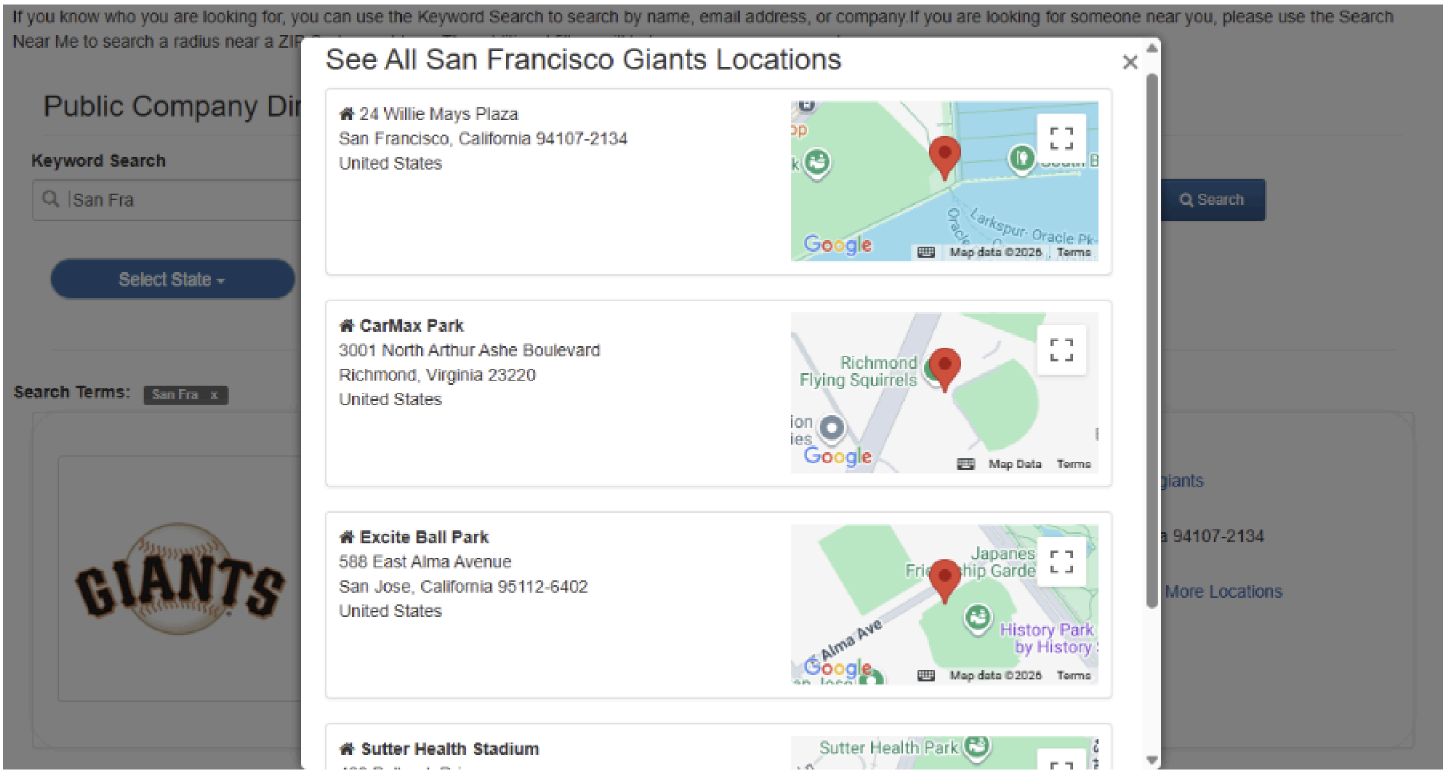
- **New Quiz Message Token:** Introduced the {QuestionsSimplyCorrectorIncorrect} message token. This displays the user's response with a simple correct/incorrect status without revealing the correct answer or full explanation.
- **Completion Label Clarification**: Updated certificate option labels when no formal certificate is issued, clearly distinguishing between No Completion Button and Show Completion Results Button to improve staff clarity.
- **Quiz Completion Fix:** Resolved a rare issue where duplicate records blocked quiz completion, ensuring users are promptly credited with a "Passed" status upon entering correct codes.

Classified Ads

- **Fee Plans' Price Adjustment functionality** now aligns with products for consistency. When "Join & Buy" is the only option, both the membership and fee plan will be added to the cart in one click, and the "Never Show" base price setting will apply to all users.

Companies

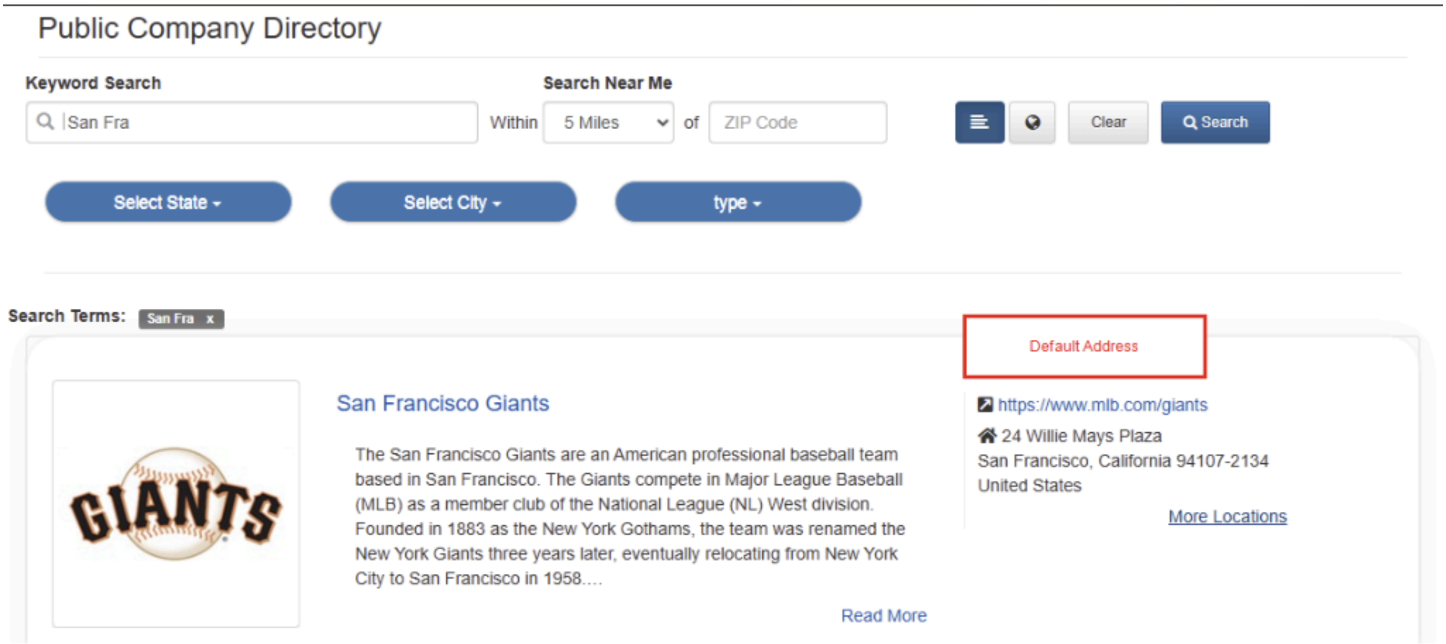
- **Custom Company Address Blocks:** Introduced configurable **Company Address Blocks** to organize and automate business locations.
  - **Label Definition:** Allows for specific, custom address types (e.g., "Headquarters," "Shipping").
  - **Automation:** New message tokens support automatic population of these addresses in invoices, statements, and email templates.
- **Multi-Branch Address Blocks:** Launched support for managing an unlimited number of company locations with custom labeling.
  - **Granular Visibility:** Admins can control public visibility for each branch via a "Show in Directory" toggle.
  - **Interactive Mapping:** All branch locations are now featured with custom labels on map pins and directory detail pages.



Directory

- **Address Filter Logic:** City, State, and Zip filters are now dependent on the address being configured for display, preventing selection when address visibility is disabled.

- **Address Formatting Overhaul:** Simplified directory configuration to a single "Show Address" setting, replacing multiple field settings (City, State, Zip).
  - **Layout Refinement:** Addresses now use a standard, stacked format for improved readability on both results and detail pages.



- Using these new Company Address Blocks, as well as the standard Company address fields, Companies can now set default addresses, which are the first to appear when viewing the company on the Directory Results page.
- **Security & Data Integrity**: A global safeguard automatically excludes all "Test Accounts" from appearing in directories or employee lists.

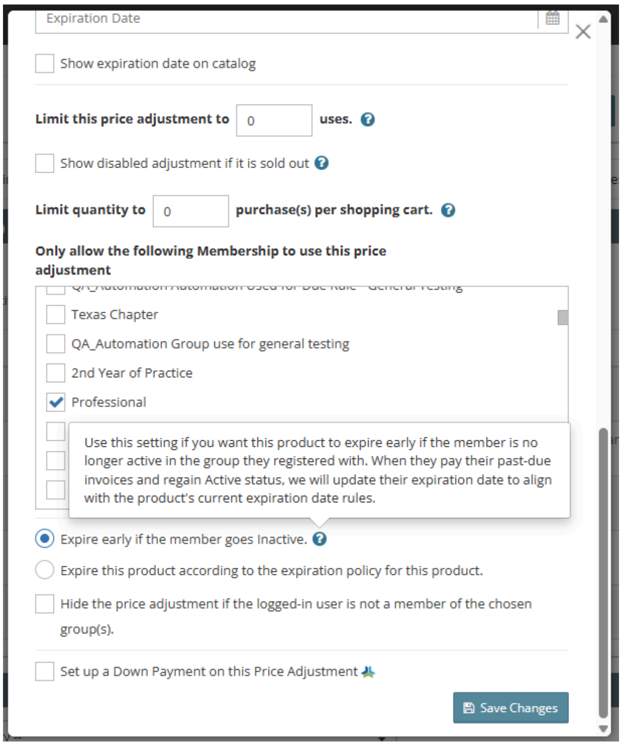
eCommerce

- **Order Field Mapping Rework:** Processor settings (AffiniPay, Stripe, Authorize.net) are now managed at the individual e-commerce account level, providing granular control over data sent.
  - **Configurability:** New tools allow toggling of "Optional Fields" (e.g., Order ID, Purchaser Name, Company) to aid in reconciling orders between CE21 and the three eCommerce providers listed.
  - **Custom Labels**: For AffiniPay and Stripe, you can now relabel CE21 fields to match the specific terminology used in your payment portal reports.
- **ACH Integration**: ACH features are now supported when using Authorize.net.
- **Fraud Configuration Relocation:** Fraud options, including the "Anomaly Alerts" trigger settings, have been moved from the Manager Settings to the bottom of the Shopping Cart Settings page.

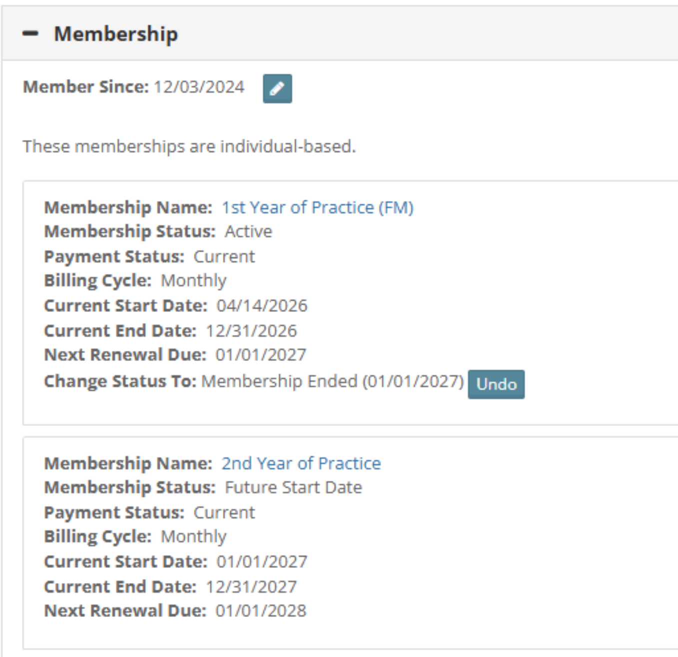
Memberships

- **Product Access Policy Update:** Product access is now revoked only when a membership transitions to an inactive status (Lapsed, Suspended, Canceled).

- **Access Guarantee:** Members now receive the full product expiration period (e.g., 1 year), regardless of their renewal date.

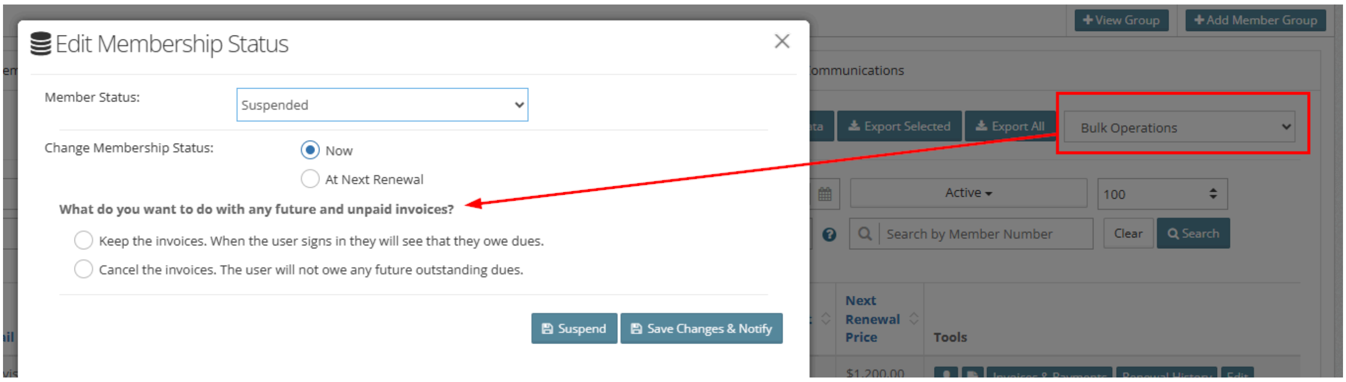


- **Multi-Tier and Multi-Membership Logic:** Access is retained if a member remains active in at least one group attached to the product's Price Adjustment.
- **Global Access Management:** Access is dynamically tied to Price Adjustment configurations. Adding or removing groups can now automatically reinstate or expire product access for affected members.
  - **Audit Trail:** All system-driven expiration changes are logged as Notes on the Customer Account for staff auditing.
- **New Status: "Future Start Date":** Introduced a new membership status to accurately handle members who have renewed or scheduled a future group change, ensuring correct reporting and access control during transition periods.



- **Staff Notification Automation:** A new automated staff notification template has been added to alert teams immediately upon a member upgrading their membership. You can find this setting and the template in the Group’s Communication Tab.

- **Bulk Suspend Control:** Enhanced the Bulk Operations tool to allow staff to choose whether to keep or cancel future and unpaid invoices when suspending multiple members.



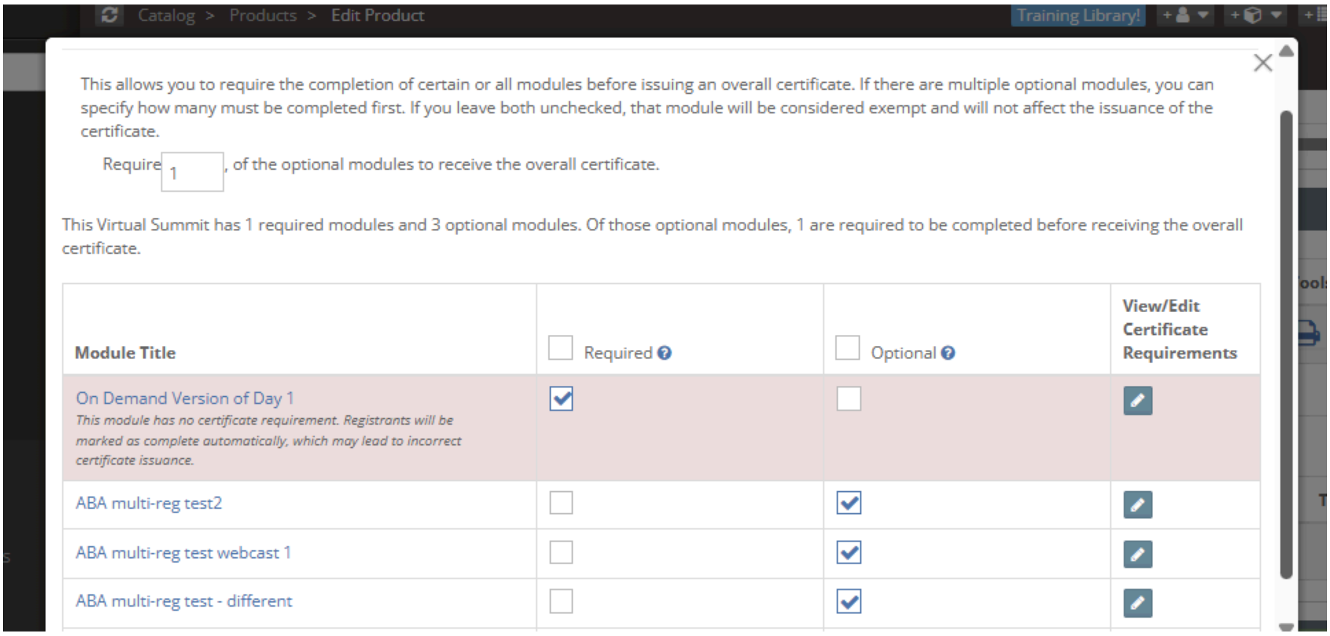
- **Company-Based Membership Checkout Fix:** The logic has been overhauled to ensure data captured during the registration question set is written back to the company profile immediately, resolving a bug and ensuring accurate dues calculation based on company data.
- **Automated Admin Notifications (CBM):** Implemented a new automated email template, "Company Admin Notification - Company Membership Notification," which triggers upon the purchase of a company-based membership. This system notification alerts existing organization administrators when a new user is provisioned with administrative privileges via the automated CBM workflow.
- **Message Token Expansion:** Significantly expanded the library of Customer and Company data tokens available for Invoices, Statements, and Membership-specific automated emails. These additional tokens support enhanced data mapping for complex company-based membership structures and custom customer profile fields.
- **Bug Fix (Email Automation):** Resolved an issue where automated communication triggers failed to execute for invoices generated through the "Renew/Generate Invoices" batch processing tool.
- **Bug Fix (Join & Buy Workflow):** Corrected a session state issue that caused the "Join and Buy" process to hang for authenticated non-members. The system now maintains cart persistence and ensures successful redirection to the membership registration interface.
- **Validation Update (Archived Memberships):** Enhanced system-wide enforcement of "Archived" status for memberships. The system now validates status during checkout, automatically purging archived items from active carts and restricting access via legacy "More Information" URL paths.
- **Logic Correction (Price Adjustment Display):** Fixed a cross-tab visibility bug where "Non-Member" pricing remained active for users with valid membership credentials. The system now globally evaluates active status to ensure that only eligible member-only price adjustments are rendered across all catalog tabs.

Notifications

- **Email Registrants Tool Relocation:** The Email Registrants tool has been moved within the product's Registrant list for greater visibility.
- **Support Settings: Ticket Escalation Timing:** Added a new "Never Wait - Send Immediately" option to the Ticket Escalation timing settings. This ensures that staff notifications are sent the moment an escalation action occurs, preventing high-priority items from being missed.

Products and Events

- **Certificate Eligibility System Overhaul: Re**vamped the Overall Course Completion certificate requirement configuration into a streamlined, instant-saving interface that categorizes modules as Required, Optional, or Exempt, improving clarity for staff and learners and allowing Exempt modules, which do not affect the issuance of the Overall Course Completion certificate.



  - We now also alert you when you've set up a module in a way that can immediately issue credit, so you can fix any mistakes before registration begins.
  - We also added more information to the user's account to indicate when a program is required or optional (and in Manager view, we even show Exempt modules).

- **Moderator Auto-Registration:** Chat and Forum moderators are now automatically registered for free upon being added, ensuring immediate access to their tools without manual staff intervention.

- **Expiration Date Safety Alerts:** Implemented alerts in the Product Edit and Bulk Update tools to prevent setting expiration dates when the content archive is not enabled, eliminating user confusion.
- **Real-Time Participation Code Updates:** Participation codes for Live Webcasts and Video Replays can now be updated in real time, pushing changes instantly to connected users via SignalR without requiring a viewer reload.
- **Registrant Display Limit Increase:** The registrant display limit has been raised to 500 per page in the registrant table to facilitate large-scale bulk operations.
- Deployed a new "Sort A-Z" capability across Faculty sections in the Manager, enabling alphabetical organization by surname in Product pages on Classrooms and Virtual Summits.
- Resolved a bug in the Agenda Import tool that caused date and time data to be processed incorrectly during the import sequence.
- Patched a "No Access" permissions error within the CE21 mobile app to ensure event agenda trigger questions are correctly served to authorized participants.
- Optimized the "Print Roster" engine to increase performance and prevent request timeouts during high-volume data operations.
- Fixed a regression in Virtual Summits where banner images would revert to older assets during unrelated event configuration updates, ensuring persistent visual customizations.
- Resolved a front-end issue where the "Submit" action on Virtual Summit forms would fail to trigger successfully.

Referral Service

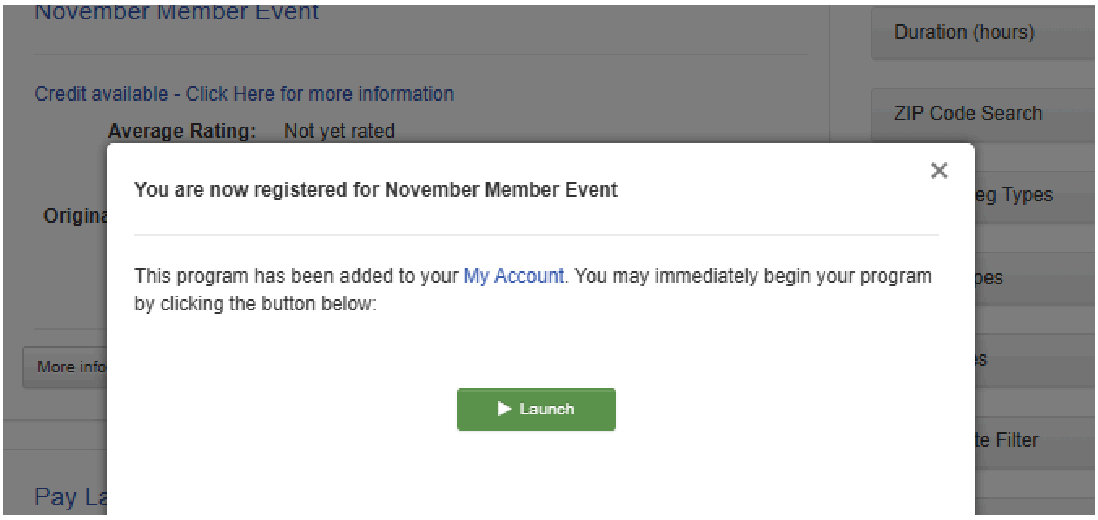
- Updated the Referral Manager to optimize the reassignment workflow for returned referrals, featuring enhanced list navigation and immediate action triggers.
  - Integrated hyperlink functionality for Referral Numbers across all entries, allowing users to launch the Manage modal directly and reducing menu navigation depth.
  - Introduced a single-click "Transfer" button in the tools column for "Referred Back" statuses, enabling rapid access to the transfer modal for streamlined reassignments.

Reports

- **Registration Report Enhancement:** The report now includes the **Guestbook Name** and **Guestbook Token** columns to track the specific registration link used.
- **Product Sales Report:** Added three key financial columns: **Check Number, Name on Check,** and **Date of Check**—to improve auditing capabilities.
- **Address Structure Support:** Revamped Company-Based Membership and Company Reports to consolidate standard address fields and dynamically support the new Custom Address Blocks and Multi-Branch locations.
- **Tag Context in Reports:** Accounts and Company-Based Membership Reports now include detailed, formatted notes for Account Tags (e.g., **VIP**: High-priority member...) to provide context within the report.
- Fixed a logic error in Completion and Registration reports where optional time-tracking metrics failed to update when a user's status changed to incomplete.

Sales

- **Quick Register Workflow Update:** Modified the Quick Register workflow for Non-Dated Launchable Products (e.g., On-Demands) to display a confirmation modal that allows the user to launch immediately or continue shopping, helping manage billing controls. You can edit these settings in Shopping Cart Settings.



- **Order Import Tool Flexibility:** Enhanced the Order Import tool with new options for Live Event Agenda Options and Registrant Question Set Options to either **Bypass** forms or **Request** missing information via automated email.
- **Payment Plan Clarity:** Shopping cart line items are now explicitly labeled as "{Title} (Payment Plan)," and a "See Payment Plan Details" button was added for final review of the billing schedule.
- **Post-Event Forms Management:** Introduced a **Bypass Pending Forms** tool to bulk update outstanding registration/agenda forms to "Bypassed" status after an event has concluded. All actions are logged to the user's account audit trail.
- Enhanced the **Swap Product modal** with a refined layout for improved label alignment and added horizontal separators between pricing tiers to streamline staff selection accuracy.
- Synchronized **Purchase Alert** logic across all Manager purchase scenarios for individual products and bundles, ensuring parity with the catalog checkout UI.
- Resolved a synchronization issue for manual ACH payments to ensure real-time invoice status updates and prevent redundant transaction processing.
- Corrected a data indexing mismatch between Azure Search (Search 2.0) and customer accounts, restoring visibility of DVD, CD, and Digital product purchases in registrant lists and reports.
- Patched a tax calculation regression in the "Charge Difference" workflow for Agenda Form responses to ensure consistent application of tax rules.
- Implemented a state-locking mechanism to prevent post-checkout quantity modifications caused by active browser tabs overwriting finalized order data.
- Refined automated billing retry logic to strictly adhere to user-defined retry limits and schedules, eliminating excessive payment attempts.
- Optimized the "Show program date for On Demands" setting logic to prevent conflicts between on-demand display preferences and scheduled event visibility within bundles.

Smart Lists

- Increased **system timeout thresholds** for Smart List exports, supporting high-volume data operations (40,000+ records) without service interruption.

System Settings

- **Audit Log Expansion:** Manager and Catalog Settings now feature complete historical audit logs, replacing the previous single-entry log.
- **Attribute Data Preservation:** Introduced a Hide functionality for Product and Order Attributes, preventing the deletion of attributes linked to historical data and preserving configuration integrity.

For more information about the CE21 platform, visit [CE21.com](CE21.com).