



NexJ Add-In for Microsoft Office Release Notes

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About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.

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Release contents

The most recent release of the NexJ Add-In for Microsoft Office is 4.6.3, and contains the following:

1. nexj-office-setup-4.6.3.exe (NexJ Add-In for Microsoft Office 4.6.3 setup executable)
2. release_notes_addin.pdf (NexJ Add-In for Microsoft Office 4.6.3 Release Notes)

Full documentation, including the user guide and setup guide, can be found online at <https://documentation.nexj.com/>. Direct links for this version of NexJ Add-In are provided here:

- [NexJ CRM - End User and Administrator](#)¹
- [NexJ CRM - Developer and Deployment](#)²

1. <https://documentation.nexj.com/crm-admin/25.08/On-Prem-Admin/nexj-crm-integration-with-microsoft-office>

2. <https://documentation.nexj.com/crm-technical/25.08/Public-On-Prem/nexj-add-in-for-microsoft-office>

Minimum requirements

Your system must meet the following requirements to use the NexJ Add-In for Microsoft Office.

Minimum Software Requirements

- Windows XP, Windows 7, Windows 8, Windows 8.1, Windows 10
- Microsoft Office 2007, Microsoft Office 2010, Microsoft Office 2013, Microsoft Office 2016, Microsoft Office 365
- Microsoft .NET Framework 4, Microsoft .NET Framework 4.5, Microsoft .NET Framework 4.6.2

Some additional Microsoft software patches may be required depending upon your environment.



Ensure that you have updated the .NET Framework to the most recent supported version.

New features

The following new features have been added to this release of NexJ Add-In for Microsoft Office.

Version 4.6.1

Disabling NexJ Add-In commands from Outlook Reading Pane

You can now disable the default ability of users to see and use NexJ Add-In commands from the ribbon in the Outlook Reading Pane, without opening the message in a new window.

Set this behavior using the new `ReplyFromReadingPane` registry key. For more information, see the “Configuring NexJ Add-In for Microsoft Office using the registry editor” topic in the **NexJ CRM - Developer and Deployment** information center.

Version 4.6.0

Support for NexJ CRM Cloud deployment

NexJ Add-In can now be used alongside Cloud deployments of NexJ CRM, making use of OAuth access delegation.

Version 4.5.5

Disabling the monitoring of Outlook item type

You can now choose when NexJ Add-In validates whether an Outlook item is supported. NexJ Add-In does not support Outlook items that are not email messages, such as meeting requests or meeting replies.

By default, NexJ Add-In validates the Outlook item type when it is selected. If it is not an email message, NexJ Add-In buttons in the Outlook ribbon are disabled.

Alternately, NexJ Add-In buttons continue to be enabled in the Outlook ribbon when any item is selected. When an action is taken, an error message is displayed if any of the selected items are not email messages. This option may improve performance.

Set this behavior using the new `EnableOutlookEvents` registry key. For more information, see the “Configuring NexJ Add-In for Microsoft Office using the registry editor” topic in the **NexJ CRM - Developer and Deployment** information center.

Support for Microsoft .NET 4.6.2

This version of NexJ Add-In was compiled on the Microsoft .NET Framework version 4.6.2.

Version 4.5.3

Support for TLS 1.2

NexJ Add-In now supports Transport Layer Security (TLS) version 1.2.

TLS protocol versions prior to 1.2 are deprecated.

Version 4.5.1

Compatibility with NexJ CRM 6.x

NexJ Add-In is now compatible with NexJ CRM 6.x, with the exception of the `HierarchicalSecurityEnabled` registry key which requires 7.x or later.

Version 4.5.0

Support for Microsoft Office 365

NexJ Add-In can now be used with Microsoft Office 365, 64-bit.

Version 4.4.11

Updated UI text

The assistive text provided in the Select from My Service Requests window has been updated to provide better guidance.

Improved UI behavior for defining task follow-ups

The **Start**, **Due**, and **Reminder** fields for creating a task follow-up now preserve key time periods when they are updated. Specifically, when you change the start date, the due date and reminder date also change to maintain the time between them and the start date. Additionally, if you change the end date, the reminder date will also update to preserve the time between it and the end date.

Option for extended name searches

You can now configure the name search behavior in NexJ Add-In for Microsoft Office so that a simple string (one without spaces or commas) searches both the first and last name of contacts for matches. Configure this functionality through the `EnableExtendedSearch` registry key. The default behavior is to search only the last name of contacts for a match.

Better scoping of stage options when searching for opportunities

When searching for opportunities within the Add-In, only those stages that are marked as active within the Opportunity Stages (SOPPTSTAGE) enumeration within the Admin Console are displayed.

Ability to set default state for the Due checkbox in the Create Task Follow-up window

You can now configure the **Due** checkbox in the Create Task Follow-up window so that it is selected by default when creating a task follow-up. Set this behavior using the new `DefaultTaskDueDate` registry key. If you do not set the key, the checkbox defaults to the cleared, or unselected, state.

Version 4.4.7

Coordinated filtering of rep codes and splits

The configuration options of the **File With** functionality have been expanded to allow the following behavior for clients who use rep codes and splits to filter the values available in the **For** field.

If you filter your contact list by rep code and split in NexJ CRM, then when you use the **File With** function in NexJ Add-In for Microsoft Office, the For field selection dialog will open with the **RepCode** and **Split** fields already populated with the same values that you used in your NexJ CRM search.

This feature provides a significant performance improvement for clients using rep codes and splits to classify and filter their contact lists.

Configure this feature using the following registry keys:

- `RestrictEntitySearchByRepCode`
- `RestrictEntitySearchBySplitRepCode`
- `RepCodeNamePrepopulateRepCode`
- `InFilterRepCodeFilterRequired`

Version 4.4.6

Windows 10 support

NexJ Add-In for Microsoft Office now supports the Microsoft Windows 10 operating system.

Restricting entity search by user entitlement

When a user is saving an email to NexJ CRM or creating a follow-up task, they can now restrict the contacts, companies, or households that are displayed in the NexJ CRM Lookup dialog based on a rep code or a split rep code. When a user specifies a rep code in the new **Filter** field in the NexJ CRM Lookup dialog, only the contacts, companies, or households associated with that rep code or split rep code are displayed.

Support for this functionality is enabled by the `RestrictEntitySearchByRepCode` or `RestrictEntitySearchBySplitRepCode` registry keys.

Filtering opportunity search

When a user is saving an email to NexJ CRM or creating a follow-up task and wants to add a related opportunity, they can now filter the opportunities that can be selected from the Opportunities dialog to quickly find the desired ones. Users can filter opportunities by text in the opportunity description, opportunity stage, or by using a predefined filter.

Version 4.4.3

Controlling the visibility of related items

You can now control which opportunities, campaigns, events, funds, and service requests are visible in the Related section of the Save Email to NexJ CRM dialog.

The following new registry keys have been added:


- `AdditionalOpportunityWhereClause`
- `AdditionalCampaignWhereClause`
- `AdditionalEventWhereClause`
- `AdditionalFundsWhereClause`
- `AdditionalServiceRequestWhereClause`

You can use Scheme code in these fields to customize the visibility of the items related to the field. For example, to set the opportunities field to display only those opportunities readable by the user, enter `(@ readable)|true` in the `AdditionalOpportunityWhereClause` registry key.

Associating NexJ Add-In with the correct version of NexJ CRM

To avoid unexpected interactions between incompatible versions of NexJ Add-In and NexJ CRM, a new registry key has been introduced. Set `DetectApplicationVersion` to 1 to ensure compatibility between NexJ Add-In and your version of NexJ CRM.

Work with your NexJ service representative to ensure you are using this setting correctly.

-  Support for this functionality is only available in the following versions of NexJ CRM:
- 8.4.0.1 and any later releases
 - 8.2.1.X
 - 8.3.1.X
 - 7.2.3.2 and any later hotfixes
 - 7.2.4.0 and any later hotfixes or service packs

If this functionality is not supported in your version of NexJ CRM, continue using the `UseRubyModel` and `UseJadeModel` registry keys, in consultation with your NexJ service representative.

Version 4.4.1

Improved ability to specify security for email messages saved to NexJ CRM

Users can now set the security level for an email message before it gets saved from Microsoft Outlook to NexJ CRM. In addition to making an email message accessible to all users, email messages may be saved to NexJ CRM with access limited to a list of individuals or with access limited to just the person saving the email message. The security options available in NexJ Add-In synchronize with the security options in NexJ CRM.

Support for this functionality is enabled by the `ShowSecurityDialog` registry key.

If the security model for NexJ CRM is customized, you may need to contact your NexJ representative to ensure that it is configured appropriately to interact with NexJ Add-In.

Registry key added for compatibility with NexJ CRM 8.0 or later

A new registry key, `UseRubyModel`, has been added to enable NexJ Add-In to work properly with the updated model used by NexJ CRM. These changes are related to associating tickers with email messages and tasks.

Version 4.4.0

Ability to track email activities as touches in NexJ CRM

In service level management, touch types represent a form of communication or interaction with a contact. If your administrator has enabled this functionality, you can now select a touch type when you save an email to NexJ CRM using the **File With** or **Send & File With** functionality. The corresponding email touches are tracked in the NexJ CRM Service Level Management dashboard.

This functionality is enabled by the `ShowSLMTouchTypes` registry key.

Ability to add an unrecognized email address to an existing NexJ CRM contact

If there are any unrecognized email addresses in an email message and if this functionality has been enabled by the application administrator, the Select contacts to add to NexJ CRM dialog may appear when saving the email message to NexJ CRM. You can now use this dialog to associate the unrecognized email address with an existing contact in NexJ CRM, instead of creating a new contact.

Support for this functionality is enabled by the `EmailMergeEnabled` registry key.

Ability to specify security for email messages

To limit who can access email activities in NexJ CRM, you can now specify the security for an individual email saved to NexJ CRM, as well as the default security for all incoming and outgoing emails saved to NexJ CRM.

Support for this functionality is enabled by the `ShowSecurityDialog` registry key.

Support for NexJ Add-In functionality from the Reading Pane

Microsoft Outlook 2013 introduced inline reply functionality, enabling users to compose replies and forward messages from the Reading Pane. The Microsoft Outlook Message ribbon now contains the NexJ CRM group, which enables you to use NexJ Add-In functionality while replying or forwarding a message from the Reading Pane.

Version 4.3.2

Ability to specify an existing company when adding a contact to NexJ CRM

In the Select contacts to add to NexJ Contact dialog, which appears when you are using the **Save**, **File With**, **Create Follow-Up**, or **View Contact** functionality, you can associate an existing company with the contact you are adding to NexJ CRM.

Support for specifying the company, which can be either optional or required, is enabled by using `ShowCompanyInAddContact` and `RequireCompanyInAddContact` registry keys.

Support for email classification

If you add a classification to an email in Microsoft Outlook, the email classification is now reflected in NexJ CRM. In NexJ CRM, the email classification is displayed in the email activity log in the contact's journal.

Support for email classification is enabled by using the `UseEmailClassification` registry key.

Version 4.3.0

Support for Microsoft Office 2016

NexJ Add-In can now be used with Microsoft Office 2016.

Resolved issues

The following issues have been resolved in the current release of NexJ Add-In for Microsoft Office.

Version 4.6.3

ADDIN-1297

An issue previously encountered when attempting to create diagnostic log files has been addressed.

Version 4.6.2

ADDIN-1270

Users of certain versions of Microsoft Outlook used to experience an issue when performing an automatic spellcheck prior to sending or saving an email message. The new `EnableSecondarySpellCheck` registry key has been added in this release to prevent this issue from occurring. In those specific versions of Microsoft Outlook, enabling the registry key ensures that both the email subject and the email body are spellchecked as required. Most versions of Microsoft Outlook are unaffected by this issue.

Version 4.5.6

ADDIN-1200

An issue which caused a conflict in environments with multiple add-ins under certain circumstances has been resolved.

Version 4.5.4

ADDIN-1158

Prior to this release, when the `LogTraceToEventViewer` registry key was enabled, users were unable to save extremely long emails to NexJ CRM. This issue has now been resolved.

ADDIN-1167

In a previous release, users as well as contacts were displayed in the **Contact** tab in the NexJ CRM Lookup dialog even when the `ShowNoUsersInContactPicker` registry key was enabled. This issue has now been resolved.

Version 4.5.2

ADDIN-1067

To improve usability, the placement of buttons in NexJ Add-In dialogs has been made more consistent.

ADDIN-1110

When searching for users, you can now use "firstname lastname" and "lastname, firstname" search patterns, as expected.

ADDIN-1130

In a previous release, an unexpected Outlook error appeared under certain circumstances. This issue has now been resolved.

Version 4.5.1

ADDIN-1104

The household list presented when using the **Send & File with** function now consistently sorts alphabetically by default.

Version 4.4.11

ADDIN-1057

If you make a change to the **Default Reminder** time for the To Do template in the Admin Console, that value is now reflected in the default value of the **Reminder** time when creating a task follow-up in the Add-In. Users must restart Microsoft Outlook for the changes to take effect.

ADDIN-1069

The Add-In installer behavior has been updated so that the `MaxAttachmentSizeInBytes` registry key is set as a REG_DWORD type rather than a REG_SZ type. The registry key reference documentation has also been updated to reflect this change.

Version 4.4.10

ADDIN-1046

An issue has been resolved that had caused the Send and Save functionality to fail when email properties were modified by 3rd-party add-ins.

Version 4.4.9

ADDIN-1020

An issue with configuring the `LogTraceToEventViewer` registry key has been resolved. Previously, configuring this registry key was time consuming for users. This registry key is now enabled by default.

ADDIN-1023

An issue with splitting Individual IDs in the FA ID field has been resolved. Previously, when you selected a different Individual ID in the FA ID field, the Splits field did not update correctly. The splits from the selected Individual ID are now displayed.

ADDIN-1024

An issue with syncing email messages to NexJ CRM has been resolved. Previously, when you created a new email and clicked Send & Save or Send & File With, the email did not save to NexJ CRM. This no longer occurs.

Version 4.4.8

ADDIN-903

An issue affecting NexJ Add-In in Microsoft Outlook has been resolved. Previously, in the **For** field, if you opened the NexJ CRM Lookup dialog and pressed Enter to add a contact, the dialog closed. This no longer occurs.

ADDIN-949

An issue affecting NexJ Add-In in Microsoft Outlook has been resolved. Previously, in the **For** field, if you opened the NexJ CRM Lookup dialog and typed in the search field, the dialog became unavailable. The dialog now remains available when you type in the search field.

Version 4.4.7

ADDIN-976

An issue around unexpected information being displayed in the Rep Code Selection dialog has been corrected, and the labels in the selection dialogs have been revised for clarity.

Version 4.4.6

ADDIN-940

As issue that sometimes occurred when users tried to add a related opportunity while saving an email to NexJ CRM or creating a follow-up task has been resolved.

Version 4.4.5

ADDIN-924

An issue affecting the **Send and Save** functionality has been addressed. Previously, the **Send and Save** function could behave inconstantly if a user was logged into the system on multiple devices concurrently.

Version 4.4.4

ADDIN-920

Users with very large numbers of contacts in their Microsoft Outlook Suggested Contacts list may encounter performance issues when using the save actions provided by NexJ Add-In.

To address this issue, a registry key, `CreateSuggestedContact`, has been introduced to allow you to configure whether NexJ Add-In should reference the Suggested Contacts list, or use only the user's address book. The default and recommended behavior is to not reference the Suggested Contacts list.

Version 4.4.2

ADDIN-854

When using the File With command, you can now specify multiple values in the **Group** field in the NexJ CRM Security dialog.

ADDIN-859

When using the File With or Create Follow-up commands, you will no longer see inactive users in the NexJ CRM Lookup dialog associated with the **For** field.

Version 4.4.0

ADDIN-208

Downgrading your installation from the current version of NexJ Add-In for Microsoft Office no longer disables the Add-In.

Version 4.3.1

ADDIN-140

The NexJ Add-In ribbon now disables as expected when invalid messages such as meeting invitations are selected in Microsoft Outlook.

ADDIN-151

A bug that triggered errors when using the File With functionality has been corrected.

Version 4.3.0


ADDIN-138

The Save to NexJ action no longer triggers an unexpected error. Previously, this error could be triggered by using the action on an inbox email that you had opened in its own window.

NexJ Add-In for Microsoft Office compatibility matrix

Ensure that your version of NexJ Add-In is compatible with your version of NexJ CRM and that you have the minimum supported requirements.

NexJ CRM Version	Minimum Recommended NexJ Add-In Version	Supported Windows Version	Supported Office Version	Supported Framework Version
9.2	4.5.1	Windows 7 Windows 8 Windows 8.1 Windows 10	Microsoft Office 2007 Microsoft Office 2010 Microsoft Office 2013 Microsoft Office 2016 Microsoft Office 365	Microsoft .NET Framework 4 Microsoft .NET Framework 4.5
9.3	4.5.2	Windows 10	Microsoft Office 2013 Microsoft Office 2016 Microsoft Office 365	Microsoft .NET Framework 4.6.2
9.4	4.5.2			
9.5	4.5.4			
9.6	4.6.1			
9.8	4.6.2			
NexJ Cloud Deployment	4.6.2			

 NexJ Add-In is supported on Microsoft Office 365, but not all possible subscription configurations are tested. Please contact your NexJ representative for more information.

Regardless of your version of NexJ Add-In, ensure that your version of Microsoft Exchange is supported by your version of NexJ CRM.

NexJ CRM Version	Supported Microsoft Exchange Versions
9.2	Exchange Server 2010
9.3	Exchange Server 2013
9.4	Exchange Server 2016
9.5	Exchange Online
9.6	
9.8	Exchange Server 2013
NexJ Cloud Deployment	Exchange Server 2016
	Exchange Online

For the most accurate requirements for NexJ CRM, refer to the release notes for your version of NexJ CRM: [NexJ CRM Release Notes](https://documentation.nexj.com/pub-relnotes/Latest/)³.

3. <https://documentation.nexj.com/pub-relnotes/Latest/>

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