NexJ CRM 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.

Table of Contents

Release contents 2

New features 3

- New features delivered in 25.02 3
- New features delivered in 24.11 7
- New features delivered in 24.08 11
- New features delivered in 24.05 17
- New features delivered in 23.11 21
- New features delivered in 24.02 23
- New features delivered in 23.08 25
- New features delivered in 23.05 27
- New features delivered in 23.02 30
- New features delivered in 22.11 33
- New features delivered in 22.09 35
- New features delivered in 22.06.4 39
- New features delivered in 22.06.1 40
- New features delivered in 22.06 40
- New features delivered in 22.04.3.0 42
- New features delivered in 22.04.2.0 43
- New features delivered in 22.04 43
- New features delivered in 22.03.1.0 45
- New features delivered in 22.03 46
- New features delivered in 22.01 50
- New features delivered in 21.12.2.0 51
- New features delivered in 21.12.1.0 51
- New features delivered in 21.12 52
- New features delivered in 21.09 55

New features delivered in 9.9.0 ... 55
New features delivered in 9.8.5 ... 57
New features delivered in 9.8.4 ... 57
New features delivered in 9.8.3 ... 58
New features delivered in 9.8.2.2 ... 58
New features delivered in 9.8.2.1 ... 59
New features delivered in 9.8.1 ... 59
New features delivered in 9.8.0.3 ... 60
New features delivered in 9.8.0 ... 61
New features delivered in 9.7.0 ... 63
New features delivered in 9.6.5 ... 65
New features delivered in 9.6.2 ... 65
New features delivered in 9.6.1 ... 66
New features delivered in 9.6.0 ... 68
New features delivered in 9.5.1 ... 73
New features delivered in 9.5.0 ... 73
New features delivered in 9.4.7 ... 80
New features delivered in 9.4.0 ... 80
New features delivered in 9.3.0 ... 84
New features delivered in 9.2.3 ... 89
New features delivered in 9.2.2 ... 90
New features delivered in 9.2.0 ... 91
Known issues and workarounds ... 97
Process Management ... 97
Microsoft Exchange Server ... 97
Mobile ... 98
Admin ... 99
Reporting and analytics known issues ... 100

Desktop ... 104
Technology ... 113
Upgrade notes ... 116
Schema changes for 25.02 ... 116
Environment file changes for 25.02 ... 117
Schema changes for 24.11 ... 117
Environment file changes for 24.11 ... 118
Schema changes for 24.08 ... 119
Environment file changes for 24.08 ... 120
Additional upgrade notes for 24.08 ... 120
Schema changes for 24.05 ... 121
Environment file changes for 24.05 ... 122
Schema changes for 24.02 ... 122
Environment file changes for 24.02 ... 123
Schema changes for 23.11 ... 124
Environment file changes for 23.11 ... 124
Schema changes for 23.08 ... 125
Environment file changes for 23.08 ... 126
Schema changes for 23.05 ... 126
Environment file changes for 23.05 ... 127
Schema changes for 23.02 ... 128
Environment file changes for 23.02 ... 128
Schema changes for 22.11 ... 129
Environment file changes for 22.11 ... 131
Schema changes for 22.09 ... 132
Environment file changes for 22.09 ... 133
Schema changes for 22.06 ... 133
Environment file changes for 22.06 ... 134

Schema changes for 22.04 135
Environment file changes for 22.04 135
Schema changes for 22.03 136
Environment file changes for 22.03 137
Schema changes for 22.01 138
Environment file changes for 22.01 139
Schema changes for 21.12 140
Environment file changes for 21.12 142
Schema changes for 9.8 143
Environment file changes for 9.8 146
Schema changes for 9.6 147
Environment file changes for 9.6 148
Schema changes for 9.4 149
Environment file changes for 9.4 150
Resolved issues 153
Version 25.02 153
Version 24.11 155
Version 24.08.0.1 158
Version 24.08 158
Version 24.05 163
Version 24.02 167
Version 23.11 170
Version 23.08.2.0 175
Version 23.08 175
Version 23.05.1.0 180
Version 23.05 180
Version 23.02.0.1 184
Version 23.02 184

Version 22.11.0.1 187
Version 22.11 188
Version 22.09 192
Version 22.06 197
Version 22.04.1.0 199
Version 22.04 200
Version 22.03.2.0 202
Version 22.03.1.0 202
Version 22.03 203
Version 22.01 207
Version 21.12.1.0 208
Version 21.12 208
Version 9.9.1.0 214
Version 9.9.0.0 214
Version 9.8.0.0 216
Version 9.7.0.0 219
Version 9.6.1.0 223
Version 9.6.0.0 225
Version 9.5.0.0 228
Version 9.4.0.2 232
Version 9.4.1.0 232
Version 9.4.0.1 233
Version 9.4.0.0 233
Version 9.3.0.1 237
Version 9.3.0.0 238
Version 9.2.3.0 244
Version 9.2.2.0 244
Version 9.2.1.0 244

Version 9.2.0.0 245
Requirements and support information 246
Server and database requirements 246
Required database drivers 250
NexJ client requirements 250
NexJ Studio hardware and software requirements 253
NexJ Data Mapping Tool minimum requirements 254
End of support information 254
Legal Notices 255
Trademarks 257
NexJ trademarks 257
Other trademarks 257

Use this information to find out the supported configurations, software and hardware requirements, new features, known issues, and other information about this release of NexJ CRM.

The release notes pertain to the following code release:

Model JAR: nexj-meta-finance-25.02.0.0-1296.1307.181.55-b10c2e67.jar

Framework Plugin: com.nexjsystems.nexjstudio_13.30.26.0.zip

The following information is reporting-specific:

Reporting JAR: nexj-meta-reportadapter-2.5.0.0-0.10.1-7e098e3e.jar

The following additional mixins may be required for this environment:

- nexj-meta-es-1.0-8-c05941a1.jar
- nexj-meta-sso-9.9.0.0-3-cf7bca9d.jar
- nexj-meta-dm-0.0.1.0-10-91eaa677.jar
- nexj-meta-financereport-2.7.0.0-0.0.41-518f1e86.jar

Release contents

As of NexJ CRM 8.9.0, documentation delivery has moved online. You can now access documentation at https://documentation.nexj.com. This change enables you to quickly find the information you need. This change enables NexJ Systems to provide you with more frequent information updates and allow you easier access to our information.

This release contains the following:

1. The NexJ Model for Finance and Insurance
2. A `mixin` folder containing additional required models
3. NexJ Studio
4. NexJ Reporting
5. These release notes

New features

This section lists features and enhancements that have been added to the product by release version.

New features delivered in 25.02

The following new functionality and enhancements to existing functionality were included in this release.

Usability enhancements

Renaming the My Contacts' Recent Activities tab

On the Home workspace the tab that was previously called **My Contacts' Recent Activities** has been renamed **Updated Activities**, to avoid confusion with the new **Latest Activities** tab that was introduced in the previous release (CRM-3285).

- The **Updated Activities** tab (previously **My Contacts' Recent Activities** tab) displays activities that have recently been updated, where the **For** field includes contacts to whom the user has access.
- The **Latest Activities** tab displays activities where the start date is soon, or activities that were recently completed, including activities without any contacts in the **For** field.

Enhancements to the Latest Activities tab

The new **Latest Activities** tab in Home workspace has been introduced to provide a central location for viewing and managing all open activity plans in one place, including recently completed and upcoming steps (CRM-2828).

This streamlined interface allows users to limit the displayed activities by type, as well as search for activities using a text search field and filter chips. Using the preview functionality, you can quickly review and modify activity details.

Keyboard navigation for data tables

You can now use the keyboard to navigate and use data tables, supporting accessibility requirements (CRM-1823). Use the following keys for navigation.

Keyboard keys	Table navigation
up arrow	Navigate to the previous row
down arrow	Navigate to the next row
Home	Navigate to the first row of the page
End	Navigate to the last row of the page
Page Up	Navigate to the previous page
Page Down	Navigate to the next page
Delete	Delete the record
Ctrl + D	Delete the record
Backspace	Delete the record
Enter	Edit the record
F2	Edit the record
Shift + Enter	Display a preview of the record
Alt + up arrow	Navigate to the previous zone of the table. Depending on the table, zones can include the table toolbar with commands, the records in the data table, and the table footer containing table navigation.
Alt + down arrow	Navigate to the next zone of the table. Depending on the table, zones can include the table toolbar with commands, the records in the data table, and the table footer containing table navigation.

Support for clickable links in schedule items

You can now include clickable links in schedule item **Notes** fields (CRM-1050). Links for Google Meet, Microsoft Teams, and Zoom meetings are now clickable directly from the preview. This improves usability for remote workers and supports NexJ Schedule Synchronization feature integration. A **Join Meeting** button has also been added for supported meeting links, providing quick and easy access without needing to copy and paste.

Settings to prevent inappropriate contacts with households

Households can now be marked as “Deceased” or “Do Not Contact (DNC)”, ensuring compliance with legal and regulatory requirements (CRM-2521). These changes are logged for compliance, and can be used for filtering and reporting.

- The **Deceased** status for the household indicates that all decision-makers are deceased, and no further engagement is required.
- Enable the **Do Not Contact** option to indicate that a household requested no contact or there is a legal restriction, but members are still alive.

QR code navigation

You can now use a QR code on a contact’s profile to navigate directly to that contact’s record using a different device (CRM-3014). The QR code is accessed from the More Actions menu on the banner in the contact’s detail view and on the contact preview on the data table view.

Related activity plans displayed in activity previews

Previews for activity plans and activities included in activity plans now include the list of assigned and future steps for the activity plan (CRM-2829). In addition, activities included in activity plan include the name of the activity plan. This information enables to review assigned and future steps without navigating away from their current work. You can also use the **Edit** and **Delete** buttons next to the listed activities for quick changes.

Additional usability enhancements

- On the Service Level Management workspace, you can now sort the data table by **Last Touch** column (CRM-2545).
- Activities with the On Hold status are now treated as Outstanding and remain active (CRM-3233). They were previously treated as Cancelled.
- On the Contacts workspace, the Households data table now displays the primary email address for the household, which behaves as the email address in the Contacts table (CRM-575).

Reporting enhancements

Improved visibility of report content classification levels

Email recipients can immediately identify the content sensitivity level of shared reports and dashboards by viewing the email subject line (CRM-3019). Users can now add a custom classification level prefix, such as “Restricted”, to the subject lines of emails containing exported or shared reports and dashboards. The prefix appears in all email notifications related to that report or dashboard.

- For reports, a new **Email Subject Prefix** field can be updated on the Details tab after clicking **Edit Report**.
- For dashboards, the new **Email Subject Prefix** field can be updated on the Dashboard Configuration dialog.

Additional reporting enhancements

- You can now configure the number of decimal places for decimal and percentage attributes at the field level (CRM-1481), both for displaying the report and for exporting it. You can configure different attributes to have different decimal precision. This value is set by using the Scale property for the subject area definition. If the value is not specified, the system defaults to the global decimal precision setting.
- Numbers now include the comma separator for improved readability (CRM-1481).
- On the **Visualization** tab, hover captions have been added to all chart selection buttons (CRM-3450), improving accessibility and usability when choosing chart types.

Technology enhancements

- A new security mechanism was added to NexJ Server to help protect against potential manipulation of the HOST HTTP header (CRM-3224). You can now inspect of the HOST header values and comparing them against a pre-configured list of "trusted" hosts.
- Icons and other images in CPM forms now have alternative text (alt text), reflecting accessibility requirements (CRM-2278).
- In order to address inconsistencies in how different DBMS platforms implemented date part functions, the syntax of the `(date-part)` Scheme function was updated with two new values for the `part` argument: `isoyear` and `isoweek` (CRM-2165). These values, when used, return the “year” and “week” parts of the date, as defined by the ISO 8601 standard. The `year` and `week` part values now return the non ISO 8601 format value for added flexibility.

- The Process page in the NexJ Admin Console now shows the Start Time and End Time for each process (CRM-3217). The end time is updated with the most recent completion time of a job associated with that process, including cancellation, failure, and error states.
- To support the global search feature, a new batch process, named GlobalSearchSyncBatchJob-requestHandshake, has been made available in NexJ Admin Console (CRM-2873). This job is used to request a handshake with the OpenSearch server. During a handshake, the index policy is set if it doesn't exist, index templates are set if they don't exist, and missing indexes are recreated.

Security, integration, and automation upgrades

- NexJ CRM now supports PostgreSQL 16 (CRM-2980).
- Apache Tomcat has been upgraded to version 9.0.97 (released by the Apache Software foundation on November 9, 2024) (CRM-3118).
- Selenium Webdriver has been upgraded to version 4.28.0 (released by the Software Freedom Conservancy on January 20, 2025) (CRM-3400).

New features delivered in 24.11

Viewing recent and upcoming activities on the Home workspace

A new **Latest Activities** tab has been added to the Home workspace (CRM-2833). It provides a centralized view of all assigned, public, and group-secured activities based on the user's security settings. By default, you can view recurring and non-recurring activities with a start date of up to 30 days in the past and up to 14 days in the future.

You can use this tab to search for activities using filter chips, including an activity plan filter.

Unlike the **My Contacts' Recent Activities** tab, it includes activities without any contacts in the **For** field. It includes activities with a start date within the specified range, rather than activities which were recently updated.

Global search enhancements

A new `queryPageSize` attribute has been added to enable capping the search results at the specified amount (CRM-2917). This value is set to 100 by default. When a result set is returned and is filtered to show fewer than the specified cap, the system will continue to query more pages until the `queryPageSize` value is reached. The maximum number of attempts is defined by the `queryMaxPages` attribute, which is set to 20 by default.

When configuring these attributes, the total value of `queryMaxPages * queryPageSize` cannot be greater than 10,000.

The `queryMaxPages` and `queryPageSize` attributes are set for each class. If multiple classes are in one query, the lowest value of `queryMaxPages` is used.

A new parameter `relationalQueryTimeout` has been added to the es.syncConfig JSON configuration (CRM-2786). It enables fine-tuning SQL timeout behavior specific to the Global Search synchronization processes.

Reporting enhancements

Ad hoc reporting

The **Include all related records** setting is now reflected in the **Summary** and **Visualization** tabs for a report, providing more accurate reporting and visualization based on the selected criteria (CRM-2867). Previously this setting only applied to the **Details** tab.

Users can now specify multiple sort fields for reports, allowing for more refined sorting options (CRM-1770). For example, in a Deals report, users can sort first by Expected Close Date and then by Deal Size.

To improve clarity for users, the report type previously labeled as “Unlisted” has been renamed to “Shareable” (CRM-542). This change makes it easier to distinguish between “Shareable” and “Private” report types.

Predefined reporting

The Task Report generated from the Tasks workspace now includes a new "Related Activity Plan" column in all output formats (CRM-2496).

Auditing enhancements

Household deletions are now included in Admin Console audit logs (CRM-2916). This matches contact auditing and ensures consistency in tracking user actions across both persons and households.

User deactivations are now included in Admin Console audit logs (CRM-2754). Previously, only user creation events were included in the logs.

Usability enhancements

Reminder alarms are no longer displayed for cancelled meetings (CRM-2887).

When you create or edit a schedule item that conflicts with an existing schedule item, a warning message is displayed (CRM-2670).

Contacts and households marked as Do Not Contact (DNC) are now excluded from contact picker dialogs by default (CRM-2533). The **Do not contact** filter has been added to the saved lists on the Contacts workspace. It's set to No by default.

Contacts and households marked as Do Not Contact (DNC) are now displayed with the [DNC] prefix in activity plan dialogs (CRM-2516).

You can now manually start activity plans directly from the Opportunities workspace (CRM-2587). On the **Activities** tab for the opportunity, click **Add**, select **Activity Plan**, and then select the activity plan you want to execute for this contact.

When using the **Update Tier** command from the data table on the Contacts workspace, a warning message is now displayed to clarify that the service models for the affected contacts are not affected (CRM-2748).

Security, integration, and automation upgrades

- A number of changes were implemented as part of Proxy Vole library update (CRM-2914):
  - The proxy-vole library has been upgraded to 1.1.5
  - The delight-nashorn-sandbox library has been replaced with with delight-rhino-sandbox library version 0.0.17
  - The rhino-runtime library version 1.7.15 has been added
- The following additional third-party libraries are now supported as part of improving functionality related to ad hoc report and dashboard exports: Puppeteer, Chromium, and Node.js (CRM-2731).
- Selenium WebDriver has been upgraded to 4.24.0 (released August 28, 2024) (CRM-2858).
- The googlei18n/libphonenumber library has been upgraded to 8.13.47 (released October 01, 2024) (CRM-2695).
- The AntiSamy library was upgraded to 1.7.6 (released July 6, 2024) (CRM-2690).
- The Oracle JDBC driver was updated to 19.21.0.0 (released November 2, 2023) (CRM-1298).
- The JSZip library was upgraded to 3.8.0 (released March 30, 2022) (CRM-690).

Updated Grafana support

The Grafana monitoring dashboard templates are now compatible with Grafana version 10 (CRM-1630).

Updated Java support

This release adds support for JDK 17 for the purposes of deploying NexJ Server in a Production environment (CRM-2568).

Exchange Online updates

Due to the deprecation by Microsoft of the ApplicationImpersonation role and its feature set in Exchange Online, the following changes have been made (CRM-2454):

- In the Synchronization tab of the Admin Console, the ability to select a method for Exchange Online, is no longer available.
- The Exchange sender channel `authComponent` attribute value should be `rpc:System.Authentication.EXO.RBAC`. You can either update the existing channel definition or create a new Exchange channel for RBAC (role based access control).

Technical enhancements

The default value of the Tomcat Maximum HTTP Header Size property was increased from 8KB to 64KB (CRM-1272).

Systems administrators can now see the metadata for and invoke the JVM diagnostic commands using the SysAdmin Console but selecting **Statistics > com.sun.management > DiagnosticCommand** (CRM-2743). Double-click on a specific command to bring up the diagnostic dialog.

Deployment enhancements

You can now set a server profile when running the `modeld` and `pushrd` scripts (CRM-2513, CRM-2614). If you specify `-p none` then garbage collector, heap, metaspace, and stack size JVM arguments will need to be set through `jvm.conf` or as command-line arguments. If the server profile is not specified, the system uses the default parameters. (To correspond to the JVM arguments that were previously set by these scripts, the default parameters prioritize performance at the expense of increased heap usage.) If you specify `minimizeHeap`, the system selects JVM arguments that minimize Java heap usage.

> The recommended Java 17 version is 17.0.13+11 to enable use of the native heap trimming option on Linux.

To avoid an issue where a heap dump was not generated if the default location did not have write permissions or had insufficient storage space, you can now use the JAVA_HEAPDUMP_PATH variable to indicate where heap dump should be saved (CRM-2461). The JAVA_HEAPDUMP_PATH variable is specified in the environment file or when starting the `modeld` and `pushrd` scripts. If this variable is not specified, then `${CONTAINER_ROOT}/log` path will be used for the heap dump instead.

React renderer updates

A number of changes to the React renderer have been implemented, to allow for future support of the Lexcial rich text editor (CRM-2865). They may affect existing implementations of NexJ CRM.

- The `react` mixin is required to use the ReactRenderer. This mixin is not included by default.
- The `finance-engage-ui` mixin is deprecated. It should not be used at the same time as the“ `react` mixin.
- The following AMD modules may be requested using `define.find` after the ReactRenderer module loads: `react` , `react/jsx-runtime` , `react-dom` , `react-dom/client` . These modules are also accessible from the `ext/react-amd` AMD module dependency.

ReactRenderer implementation changes:

- An issue where _onremove callback is not called in some cases was resolved.
- New class methods added for handling lifecycle and GC issues:
  - _componentEOL: React component to clear React component props at end of lifecycle. Use same DOM/view structure as _component.
  - _onAFLChange: Optional callback to route custom update behavior through partial update calls rather than a full render call.

New features delivered in 24.08

The following features and enhancements are included in NexJ CRM version 24.08.

Reporting enhancements

A number of reporting enhancements are included in this release:

- Added a feature that allows the user to control whether an attribute can be used in filtering, sorting and aggregate functions by setting appropriate flags during subject-area configuration (CRM-1578).
- When you click on a field name in the **Details** tab on the Reporting workspace, you can choose to add the field as a grouping, calculation and filter, if these options are supported for

that field (CRM-1010). This feature is supported for both calculated and persisted fields. In addition, if you click on the field name of a calculated field, you can choose to edit the field definition.

- It is now possible to embed ad hoc report components (Details, Summary, and Visualization) as context-sensitive dashboards on NexJ CRM screens (CRM-924). While adding such a dashboard currently requires a minor development effort, the ad hoc report would be fully configurable by the CRM users.
- Updated the behavior of the information icons ⓘ displayed in various areas of the Reporting workspace (CRM-1011). Click these icons to display the tooltip text.
- It is now possible to apply filters to calculated fields that include the `RANK()` function (CRM-1194).
- When a dashboard configuration is updated, the user-applied filters will no longer be automatically reset when this is not necessary (CRM-1936).
- A new `defaultSort` parameter was added to Reporting subject area configuration to specify the default sort order that should be used if no other sorting attributes are configured for a report (CRM-2137). For Contacts, Households, Leads, and Users subject areas, the default sort order is by Full Name (CRM-2599).
- The wording of some of the notification messages produced by NexJ Reporting were updated to achieve greater consistency (CRM-2182).
- When a report or a dashboard is shared by email, each recipient now gets an individual copy of the email, rather than a single email listing all the recipients (CRM-2301).
- A user-configurable unique identifier field was added to the report configuration (CRM-2383). The identifiers can be used to access reports through a shared URL or to reference the report from a dashboard. When creating or editing a report, the **Report Identifier** field is located on the bottom of the report settings panel on the **Details** tab. The initial identifier is automatically generated from the title. The identifiers must be unique and follow these rules: alphanumeric characters and dashes are allowed, spaces and other symbols are disallowed, there is a 64 character limit.
- A user-configurable unique identifier field was added to the dashboard configuration (CRM-2363). The identifiers can be used to access dashboards through a shared URL. When creating or editing a dashboard, the **Dashboard Identifier** field can be viewed in the Dashboard Configuration dialog accessed by clicking the **Dashboard Configuration** button ⚙. The initial identifier is automatically generated from the title. The identifiers must be unique and follow these rules: alphanumeric characters and dashes are allowed, spaces and other symbols are disallowed, there is a 64 character limit.
- For association fields (for example, “Author”), the name attributes (for example, “Author > Full Name”) were removed from field selection dialogs in order to reduce redundant and possibly bad configurations (CRM-2310). Selecting the associated field includes the name

attribute. The name attributes are still displayed in the Add Filters dialog. Additional tooltip information was added for clarification.
- Non-administrative users can now use the "Set Owner" function on reports they own (CRM-2322). Any reporting user can be assigned the `rpt:ReportSetOwner` privilege to enable this ability, not just administrative users.
- When adding a filter on an associated field where the value is an entity, you can now configure "Current User" as a special context-aware value (CRM-2381). For example, when defining the "Assign to" filter, you can set the **Value Type** field to Current User. Alternately, you can set the **Value Type** field to Specific Values and then specify the user names in the **Values** field.
- When sharing a report by email, you can now select which attachments should be included in the email (CRM-2426). In the **Settings** tab, in the Export card, you can choose at least one of the following attachment types: Full Report (PDF), Details (CSV), Summary (Excel), Visualization (PNG).

Searching for records across the entire application

> Prior to this release, the Global Search feature was only supported for Cloud-deployed environments. It is now available in all environments.

Prior to this release, you were only able to search for a specific type of record on the associated workspace. Starting with this release, you can now run a free text search across the entire application to find entities and activities (CRM-184).

Click the **Search** button on the application bar to open the Search workspace. In the Search field, enter the search keywords and press Enter. All matching items are displayed below. Click the question mark icon in the Search field to see supported syntax and examples (CRM-1255).

You can use the filter buttons to view only Contacts (including contacts, companies, and users) or only Activities (including tasks, schedule items, documents, notes, and emails). You can also use the **Filter options** button in the Search field to limit the record displayed based on either the last modified date or other dates associated with the record. By default, these dates for activities are start and end dates, and for entities this is the birth date.

You can also use the `Related` search word in the Refine search dialog accessed by the filter icon (CRM-1675). Use this operator to specify information related to the search term. By default, the only related information you can specify is for activities, specifically the names of contacts or users included as participants in the activity. For example, you can search for the term "email". To limit the results that are displayed, you can then specify the value "jones" in the **Related** field in the

Refine search dialog. This will display all the emails where either the For field or the Assign To field contain "jones".

To see summary information about a record without opening the detail view, click the record to open the Preview sidebar, containing the record preview. To see the full record, click the **View Details** button where it is available.

The number of results for each category is included in the category label (AFL-6823).

A new batch job has been added to the Admin Console to facilitate the initial load of the search server (CRM-1155). It may also be used for ad hoc loads caused by an exception condition or a configuration change. If the Global Search feature is enabled in your environment, the new GlobalSearchSyncBatchJob can be found in the Batch Broker on the Admin Console.

Users must be assigned the AFLShowGlobalSearch privilege to be able to see the Search icon and open the Search workspace (CRM-6825).

Global Search feature enhancements

> This section is currently only applicable to NexJ CRM deployments in Cloud environments. While these enhancements are included NexJ CRM deployments in all environments, only users in Cloud environments will be affected by the changes.

Added a new `bookmark` parameter to the Global Search synchronization job (CRM-2318). An OID bookmark may be used to specify a starting point for the data synchronization process. In addition, the OID of the first instance that failed to synchronize will now be added to the batch job log, making it possible to restart the synchronization process from the point of failure.

The error handling logic of the Global Search synchronization job was enhanced to log and then skip over individual records that failed to synchronize (CRM-2288). The maximum number of log entries is configured by the `max_error_count` parameter in the es.syncConfig JSON configuration.

Added a new configurable parameter `relationalQueryTimeout` to the es.syncConfig JSON configuration, which enables fine-tuning SQL timeout behavior specific to the Global Search synchronization processes (CRM-2786).

Added a new `deleted` parameter to the Global Search synchronization job (CRM-2349). When the parameter is set to `false` all soft-deleted records will be excluded from synchronization.

Usability enhancements

Starting with this release, contact profiles no longer display Opportunity badges for opportunities that are closed. They also do not display Campaign badges for campaigns that are closed or cancelled, or if the contact's participant status is “Not Interested” or “Do Not Contact” (CRM-599).

When the **Do Not Contact** option is selected for a contact or household, this information is now included in the **Audit Trail** tab for that contact or household (CRM-2527).

The ability to filter important dates both including and excluding the year has been introduced (CRM-2441). For Client Anniversary and Wedding Anniversary filters, you can specify the month and date, but not the year.

Activity Plan enhancements

When creating a step in a targeted Activity Plan, users can now specify the duration for the task or schedule item (CRM-2224). Users can choose from the following options in the **Schedule Item Duration** field: 15, 30, 45 or 90 minutes, 1, 2 or 3 hours. Previously, all steps were originally created with the default 30 minute duration.

A new **Related Activity Plan** column has been added to the data table on the Tasks workspace (CRM-2327). This allows users to identify activities that are part of an activity plan. Clicking the link in the Related Activity Plan column open the full details of the plan.

Hierarchy enhancements

The tree control used to display the Company and Household hierarchies on the **Hierarchy** tab on an entity’s detail view has been enhanced.

The control can now display more than 10 records and its appearance and behavior have been improved (CRM-1270).

Users can now view and navigate to the related entities from the hierarchy (CRM-1544). Click on a hierarchy member’s name to display the Preview sidebar for that entity.

System monitoring enhancements

It is now possible to mask the values of sensitive model attributes when they are printed to the system logs (CRM-2199). A new `logMask` parameter can be applied to a class attribute or an event argument to designate it as sensitive and to specify the mask value. In addition, system administrators can turn the feature on and off using the NexJ System Admin Console. On the

Statistics page, navigate to **<nexj.finance> > Administration** and double-click the **Enable sensitive attribute masking** property.

Administration enhancements

Administrators can now use the NexJ Admin Console to update Keycloak users with a new password, using the new **Change Password** button on the Users page (CRM-2172).

Security, integration, and automation upgrades

- Apache ActiveMQ has been upgraded to version 5.18.4 (released by the Apache Software Foundation on April 11, 2024) (CRM-1205).
- Apache Ant has been upgraded to version 1.10.14 (released by the Apache Software Foundation on August 20, 2023) (CRM-2232).
- Apache Avro has been upgraded to version 1.11.3 (released by the Apache Software Foundation on Friday, September 22, 2023) (CRM-2230).
- Apache Kafka client has been upgraded to version 3.7.0 (released by the Apache Software Foundation on February 27, 2024) (CRM-800).
- Apache Tomcat has been upgraded to version 9.0.89 (released by the Apache Software Foundation on May 7, 2024) (CRM-2233). Ensure that you follow the instructions in the https://nexj.atlassian.net/wiki/spaces/PUBDEV9x/pages/edit-v2/59970806#Additional-upgrade-notes-for-24.08 section when upgrading to avoid errors related to passwords and security.
- Apache Xalan Serializer has been upgraded to version 2.7.3 (released by the Apache Software Foundation in April 2023) (CRM-856).
- Apache Xerces has been upgraded to version 2.12.2 (released by the Apache Software Foundation on January 24, 2022) (CRM-857).
- MySQL JDBC Connector has been upgraded to version 9.0.0 (released by Oracle on July 1, 2024) (CRM-925).
- Netty has been upgraded to version 4.1.100 (released by the Netty project on October 10, 2023) (CRM-1278).
- PostgreSQL JDBC Driver has been upgraded to version 42.7.3 (released by the PostgreSQL Global Development Group on March 13, 2024) (CRM-814).
- Selenium has been upgraded to version 4.20.0 (released by the Software Freedom Conservancy on April 25, 2024) (CRM-2252).
- The date.olson.db.js module has been upgraded to version 2024a (released by IANA on February 1, 2024) (CRM-2415).
- The IANA top level domain list has been updated to version 2023082500 (CRM-861).

Security enhancements

PingFederate support

PingFederate is now supported as an OAuth provider for the purposes of enabling SSO configuration in NexJ CRM (CRM-1185).

NexJ Studio

The DITA Open Toolkit, which is used in the Generate NexJDoc tool in NexJ Studio, is no longer distributed with NexJ Studio (CRM-789). If you want to use the Generate NexJDoc tool, you must download and install DITA Open Toolkit (the supported version is 2.5.4-1) from DITA Open Toolkit (dita-ot.org)[1].

When you run the Generate NexJDoc tool in NexJ Studio, you will be required to explicitly specify the filesystem location of the DITA Open Toolkit libraries.

New features delivered in 24.05

The following features and enhancements are included in NexJ CRM version 24.05.

Additional support for not communicating with entities

The Do Not Contact (DNC) feature is designed to warn users from sending communications to contacts or households that do not wish to be contacted or the firm has decided not to contact any longer and was included NexJ CRM version 24.02 (CRM-97). In this release, additional functionality is supported for this feature:

- When a user tries to create a new opportunity or service request for a contact flagged as "Do not contact", they are now warned to confirm whether they intend to do that (CRM-1040, CRM-1041).
- When a user tries to add contacts flagged as "Do not contact" as participants to a campaign, either individually or using a batch command, the user is now warned about this and can choose to either include or exclude these contacts from the campaign (CRM-1039).
- When a campaign has participants that have been flagged as "Do not contact", some workflow actions may not be executed for these participants (CRM-2206).
- When users create reports or dashboards, the contacts flagged as "Do not contact" are identified with the "[DNC]" prefix in the Full Name field, where appropriate (CRM-1738).
- Users can now include the Do Not Contact attribute as a field in reports and use it for sorting, filtering, or in a calculated field where possible (CRM-1036).

1 https://www.dita-ot.org/

- When adding a contact to a household or specifying a household for a contact, if there is a mismatch in the “Do not contact” value between the two entities, the user is given the option to change the value so that the contact and household are both flagged or both not flagged (CRM-2075).

Reporting enhancements

The following enhancements to the Reporting workspace and functionality have been included in this release.

PDF export formatting enhancements for reports and dashboards

In order to give users a greater control over the layout and formatting of PDF exports, a new PDF Format card has been added to **Settings** tab of a report (CRM-515). You can use the settings on this card to specify how to treat reports where both the rows and columns exceed a single page, which parts of a report should be included in the PDF, font size and padding, and other settings.

For dashboards, a new Settings dialog was introduced with similar options (CRM-1892). This dialog can be accessed from the **More Actions** menu on a dashboard.

In addition, default values were updated to ensure better compatibility with reports that contain a large number of columns.

Changing report ownership

Users with appropriate privileges can now change the ownership of reports (CRM-2089). This feature is intended for the support staff who regularly help CRM users configure their reports. It can also be used when transferring reports from one CRM user to another.

In the **All Reports** or **My Reports** tab, click the **More Actions** button and select the **Set Owner** command. When report ownership has been changed, both the new and the previous user are notified.

Only users with the `rpt:gReportAdmin` privilege have access to this functionality.

Canceling a report export

You can now cancel a report export that is in progress or has failed due to an error (CRM-1877). In the **Export History** tab for the report, use the **Cancel** button on the row with the report export details. When a report export is completed, this button is replaced by the **Download** button.

Default sort order

A default sort order on the name attribute is now applied to each report, even if no sort field was selected in the report configuration (CRM-2136). For example, a Contacts report would be sorted on the Full Name field by default.

Subject area enhancements

New association fields have been added to the following subject areas. Where possible, they can be included in reports, used for filtering or sorting, and included in calculated fields:

- **Custom Fields** field has been added to Contacts, Companies, and Households subject areas (CRM-1794)
- **Categories** field has been to Contacts, Companies, and Households subject areas (CRM-1793)
- **Household Member Role** field has been added to the Households and Contacts subject areas (CRM-1773)

Global Search enhancements

> This section is currently only applicable to NexJ CRM deployments in Cloud environments.

You can now click the question mark icon in the Search field on the Global Search page to see supported syntax and examples (CRM-1255).

You can use the Related search word in the Refine search dialog accesses by the filter icon (CRM-1675). Use this operator to specify information related to the search term. By default, the only related information you can specify is for activities, specifically the names of contacts or users included as participants in the activity. For example, you can search for the term “email”. To limit the results that are displayed, you can then specify the value “jones” in the Related field in the Refine search dialog. This will display all the emails where either the For field or the Assign To field contain "jones".

Keycloak support

> This section is currently only applicable to NexJ CRM deployments in Cloud environments.

This release enables system administrators using NexJ Admin Console to manage CRM users to create and manage records in Keycloak at the same time (CRM-1539). This allows the administrators to directly manage identity and access for end users.

Use NexJ Admin Console to synchronize the following actions with Keycloak in real time.

Creating new users

On the User page in the Details tab, click the **Add** button to create a new user in both NexJ CRM and Keycloak (CRM-1863). For users that should be authorized through Keycloak, specify the `keycloak:` prefix in the **Login** field. For example, `keycloak:jsmith`.

The new user will be created with the default password specified for the environment during deployment. They will need to change the password when they log in for the first time.

Updating user information

To edit a user's record, on the User page, open the user record and click the **Edit** button next to the user First Name field. Changes to the users first name, last name, login, and email are synchronized with Keycloak (CRM-1865).

Deactivating and reactivating users

For active users, on the User page, open the user record and click the **Deactivate User** button below the user information (CRM-1867). The user's account is deleted in Keycloak (CRM-1864).

For inactive users, the button changes to **Reactivate User**.

When a user is reactivated, they will have the default password specified for the environment during deployment. They will need to change the password when they log in for the first time since their reactivation.

Unlocking users

If a user's account gets locked from too many incorrect logins, the administrator can unlock it (CRM-2146). On the User page, open the user record and click the **Unlock Oauth User** button below the user information.

When a user is unlocked, they will have the default password specified for the environment during deployment. They will need to change the password when they log in for the first time since their account was unlocked.

Usability enhancements

The following additional usability enhancements are included in this release:

- The email dialog accessed from the **Activities** tab has been revised to match other email dialogs in the application (CRM-1488).
- When adding an activity plan to a contact's record, you can now specify both date and time in the **Start** and **Due** fields in the New Activity Plan dialog (CRM-1853).

- You can now add new product types during runtime using the Admin Console on the Enumerations page (CRM-2198)

Security enhancements

This release included the following security enhancements:

- The Apache Tomcat server version has been updated to 9.0.89 (released May 3, 2024) (CRM-1517)
- The googlei18n/libphonenumber library has been upgraded to 8.13.26 (release November 21, 2023) (CRM-1279)

Automation enhancements

This release includes the following automation enhancements:

- Selenium has been upgraded to version 4.18.1 (released February 19, 2024) (CRM-1766)

New features delivered in 23.11

The following features and enhancements were included as part of 23.11.

Ad hoc reporting enhancements

The following enhancements have been added to ad hoc reporting and dashboard functionality.

New summary grouping option

For reporting visualizations where values are grouped and displayed bar charts, you can now select how many groups should be displayed individually and which groups can be displayed as a single common value (CRM-939). When editing a report on the **Visualization** tab, select the new **Limit the number of displayed groups** field and complete the other fields that appear. The following fields based on the grouping selected for the visualization:

- **Distinct groups**
  The number of specific named groupings that should be included in the chart. For example, if the data is grouped by activity status you specify 3, only the activities with the most popular three statuses will be displayed individually, and the rest will be displayed in one common group.
- **Order**
  Indicates which specific named groupings should be included. For example, if the data is

grouped by number of activity status, you can choose whether to display the activities with the most common statuses or the least common statuses separately.

- **Label for other groups**
  By default, the groups which are not labeled and displayed individually are labeled "Other". Use this field to specify a different label for this grouping.

Additional reporting enhancements

If the value for a report field is very long and the report is exported to CSV format, the value is truncated to ensure it does not exceed the maximum allowed length for the application that will be used to open the exported report, such as Microsoft Excel (CRM-208). This value is set to 32758 by default and can be modified using NexJ System Admin Console. To edit the value, open the Statistics page, navigate to nexj.finance > Administration > Reporting > Export, and edit the **Max field length** value.

When you open a report that hasn't been updated since it was last edited then the report is immediately updated so that the **Summary** and **Visualization** tabs display the latest information (CRM-1269).

When you open a dashboard containing reports that haven't been updated since they were last edited then the report is immediately updated. After the update is finished, the dashboards will display the latest information (CRM-816).

In the Configure Filters dialog, if you click **Cancel** then a confirmation message will be displayed, to avoid accidentally losing any intended edits (CRM-525).

Tasks workspace enhancements

You can now quickly create a new task from the Tasks workspace by entering a description of the task into the quick task text field above the data table (CRM 1008). The description is included in the **Description** field and may be truncated to fit into the field. The complete text of the description is included in the **Notes** field. After a task is created using the quick task field, it can be treated as any other task. It can be edited, deleted, marked as complete, emailed, or have a call record created for it.

Lead management enhancements

Integrated Leads Management enhancement

When using the predefined **Leads** filter on the Contacts workspace, you can now display the lead's household name (CRM-1210). You can select the **Household** column by using the **Select column** command in the **More Actions** menu.

Classic Leads feature enhancement

When a lead's status is changed on the Leads workspace, the associated contact's status changes automatically (CRM-980). When a lead's status changes to Qualified, the associated contact's status changes to Prospect. When a lead's status changes to Archived, the associated contact's status changes to Other.

Security enhancements

This release includes the following security enhancements:

- The date.olson.db.js module has been upgraded to 2023c (released March 28, 2023) (CRM-141)
- The AntiSamy library has been upgraded to 1.7.3 (released April 12, 2023) (CRM-853)
- The googlei18n/libphonenumber library has been upgraded to v8.13.20 (released on September 6, 2023) (CRM-858)
- The yGuard obfuscator has been upgraded to 4.0.0 (released November 4, 2022) (CRM-215)

Automation enhancements

This release includes the following automation enhancements:

- Selenium has been upgraded to version 4.13.0 (released September 25, 2023) (CRM-1060)

New features delivered in 24.02

The following features and enhancements were included as part of 24.02.

Support for not communicating with entities

The Do Not Contact (DNC) feature of NexJ CRM is designed to warn users from sending communications to contacts or households that do not wish to be contacted or the firm has decided not to contact any longer (CRM-96, CRM-97). For example, this capability can be used for leads who have communicated that they do not want to be contacted any further, clients where there has been a disagreement, or where a client has passed away. Companies cannot to be designated as DNC as this is expected to be managed with the underlying contacts at the company.

To designate a contact or household as DNC, navigate to the Edit Dialog and select the new **Do Not Contact** checkbox field. A new **Do Not Contact** filter chip has been added to contact and household searches to enable including or excluding these entities from search results.

When a household designated as DNC, all members of the household are also automatically be designated as DNC. However, you can remove the designation from individual household members by navigating to the contact's record and clearing the **Do Not Contact** checkbox.

After a household or contact is designated as DNC, their name in the banner is prefixed with “Do Not Contact”. Their name is also prefixed with either "Do Not Contact" or "DNC" in various other locations within the application. For example, in the data table on the Contacts workspace, the **For** field of a schedule item, or in a predefined report. The shorter prefix is used where the longer prefix cannot be legibly displayed.

When you try to send an email, create a schedule item, or print a document for one or more contacts, a warning message will be displayed. You can still choose to include the contact in the activity by following the instructions in the warning.

To enable this feature, you must set the doNotContactEnabled environment property for the deployment to `true`.

Identifying deceased clients

A new contact status has been introduced to identify deceased clients. To indicate that a client is deceased, navigate to the Edit Dialog for the contact, and select Deceased in the **Status** field. The contact's state remains active, but the following additional changes occur:

- The contact status in the contact list is updated to show “Deceased”.
- The banner in the detail view of the contact's record displays a new Deceased badge.
- The contact is designated as DNC (Do Not Contact) to prevent communications being sent to them in error. See "Support for not communicating with entities" section for the description of the DNC feature.

Reporting enhancements

- Added support to enable or disable currency conversion (CRM-152). To support this, the new currencyConversion subject area flag can be updated for individual fields.
- Added a feature to enable report administrators with appropriate privileges access and execute reports on behalf of other users (CRM-504). To support this, the new ReportImpersonate privilege has been added.
- Developers can now configure custom logic to control how specific subject area attributes are queried in the process of generating a report (CRM-1533). This is an advanced developer-oriented feature aimed to help address complex ad hoc reporting requirements.

Usability enhancements

Added shading of time slots outside of business hours on day and week views on the Schedule workspace (CRM-1131).

Technology enhancements

Added support for integration with InfluxDB v2.x for the purpose of synchronizing key system performance statistics (CRM-1603).

Security enhancements

OpenJDK 11 version has been updated to 11.0.22+7 (released January 18, 2024) (CRM-1610)

Apache Tomcat server version has been updated to 9.0.83 (released November 15, 2023) (CRM-829)

New features delivered in 23.08

The following features and enhancements were included as part of 23.08.

Ad hoc reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

Calculated fields

In addition to the functions supported in previous releases, the following new functions are supported within a calculated field formula (CRM-93):

- The following aggregate functions: AVG, COUNT, MAX, MIN, SUM. Use them to perform calculations on groups of values specified by associated collection fields.
- PERCENTOF function. Use it to calculate the value of a number as a percentage of the sum of all values within each specified grouping or within all values included in the report.
- RANK function. Use it to determine the rank of a value within a specified grouping or within all values.

For more details about the new functions, refer to the description included with each function on **Add Calculated Field** dialog.

Using calculated fields as filters, in sorting, and on the **Summary** tab as groupings and calculations is now supported. Inclusion of aggregate or other specific functions within a calculated field formula may result in such calculated field's usage being restricted. Use **Validate** function on **Add Calculated Field** dialog to confirm the supported operations for each formula.

Summary calculations

In order to maintain the accuracy of aggregate details displayed on the **Summary** tab of a report, a new Distinct Count calculation operator was added (CRM-705). It replaces the Count operator as the default operator when a calculation is added to a report. Use the Distinct Count operator when an associated collection is used as a grouping field or a filter is applied to a calculated field that contains an aggregate function.

Usability

- When building a report, you can now specify relative date values in reporting filters (CRM-267). The "look and feel" and the functionality of the filter dialogs match other NexJ CRM workspaces. You can use "day", "week", "month", "quarter", "half", or "year" intervals to indicate a date in the past or the future.
- Improvements were made to the "look and feel" as well as wording used during the validation of a calculated field formula syntax (CRM-261). Also, a positive user feedback, notifying of a successful formula validation, was introduced.

Relative date filter improvements

The intervals for relative dates in filter dialogs have been expanded to include "week", "quarter", and "half" (CRM-181).

For more information, see "Searching and filtering in NexJ CRM", "Activities", and "Navigating the NexJ CRM user interface" topics in end-user documentation.

SLM workspace improvements

Where a user creates their own touch types, they did not previously have the ability to add those touch types as saved filters in the Service Level Management workspace. This capability has now been enabled within the workspace (CRM-147). When a user has created a new touch type, they can navigate to the Service Level Management workspace, add a filter, and see the new touch type as an available filter option.

After the application has been deployed, end users must navigate to the **User settings** menu and select **Reset User Interface**. This will remove any current user-defined filters from the Service Level Management workspace, which can be added back by using the **Select favorites** menu.

For more information, see "Configuring Service Level Management settings" in technical documentation and Service level management" in end-user documentation.

Automation enhancements

This release includes the following automation enhancements:

- Selenium has been upgraded to version 4.11.0 (released July 31, 2023) (CRM-812)

New features delivered in 23.05

The following features and enhancements were included as part of 23.05:

Specifying relative dates

You can now specify dates as they relate to the current date (such as 3 days ago or 2 weeks later) instead of specifying an exact date (such as May 18, 2023) (AFL-8279).

This functionality is supported in two areas of NexJ CRM:

- In New or Edit dialogs for activities, you can indicate a relative date in date fields, such as **Start Date** or **Due Date** for tasks. You can use the "day" interval to indicate a date which is in the past or the future, up to 90 days removed from the current date.
- In filter dialogs used to search for a record, you can specify relative dates in date filters, such as the **Last Updated** filter on the Contacts workspace or **First Response Date** filter on the Service Requests workspace. You can use "day", "month", or "year" intervals to indicate a date in the past or the future.

This functionality is not yet available in the Reporting workspace.

For more information, see "Searching and filtering in NexJ CRM", "Activities", and "Navigating the NexJ CRM user interface" topics in end-user documentation.

Displaying additional information about activities

When viewing a list of activities in a data table, you can now see the full notes associated with each activity. The note is displayed as a new row, below the row with all other information about the activity. To include the notes rows in the data table, use the **Select columns** command (which may be accessed from the **More Actions** menu for the data table) to select the **Note** field.

In a previous release, this feature was only supported in the **Activities** tab on the **Contacts** workspace.

It is now supported on the following tabs and workspaces (AFL-8242):

- Tasks workspace
- Home workspace on the **My Contact's Recent Activities** tab
- Document Manager workspace

- Opportunities workspace on the **Activities** tab
- Service Request workspace on the **Activities** tab

For more information, see "Activities" and "Adding notes" in end-user documentation.

Integrated Lead Management feature enhancements

NexJ CRM now supports two ways of managing leads, Classic Leads and Integrated Lead Management. The Classic Leads feature continues to use a separate Leads workspace to manage leads as separate objects from contacts. After a lead has been qualified, it can be converted into a contact.

The new Integrated Lead Management capability defines a lead as a regular contact with the status "Lead", which can be managed using the Contacts workspace. The experience of working with a lead is identical to that of working with other contacts. For example, you can update contact details or create activities for a lead, in the exact same way as you would for any other contact. The progress of a lead to a prospect or a client is seamless to the user.

If Integrated Lead Management is enabled, the new **Leads** subject area is displayed on the Contacts workspace (AFL-8318). By default, the data table for the **Leads** subject area displays leads-specific fields as Lead Status and Market Segment.

If you select the **Leads** saved filter on the Contacts workspace, you can run a batch process to assign an owner to multiple leads at once or change the lead status of multiple leads at once. The results of the batch processes can be seen in the Batch Processes workspace (AFL-7803).

For more information, see "Managing leads (Integrated Lead Management)" in end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

- A confirmation dialog was added to ensure that users do not inadvertently lose changes when they select the **Cancel** or **Revert** button after configuring a report (CDM-5272).
- Updated the wording used in cases where the files generated by a scheduled report exceed the maximum allowed attachment size (CDM-5326).
- The naming of action buttons used in various dialogs across the Reporting workspace was standardized (CDM-5325).
- Updated the wording used in cases when a report needs to be updated (CDM-5323).
- Related (associated) records now respect filters (CDM-5185). You can specify how to display the associated records (for example, Related Activities for a Contact) in a report. Choose whether all available related records or only those matching the report filters are included. To

control which associated records are included, use the new **Include all related records** field on the **Details** tab.
- It is now possible to include Object ID as a report field (CDM-5324). A new subject area configuration parameter `showObjectId` was added to control the visibility of the Object ID field, which is hidden by default. When enabled, the Object ID will be included in the list of available fields for the affected subject area and may be used in a filter.

Including calculated field in reports

You can now create new report fields based on calculations at run time (CDM-5085). When creating or editing a report, click **Add Calculated Field** on the **Details** tab to open the new dialog, which was introduced to facilitate the configuration of calculated fields for each report. The rich Domain Syntax Language (DSL) used in defining the calculations includes support for:

- Referring to an existing report field
- Common arithmetic and relational operators
- Functions that allow numeric, text, date, timestamp, and other computations
- Conditional logic and logical operators

Support for using calculated fields as filters, in sorting, or on **Summary** and **Visualization** tabs will be added in future releases.

Usability enhancements

This release contains the following usability enhancements:

- If a schedule item has been cancelled, this status is now shown on the Schedule workspace as the [Cancelled] prefix to the schedule item description (AFL-8295).
- When adding or updating an address for a household, available options have been expanded to match those available for contact (AFL-7782).
- On the Today's Agenda card on the Home workspace, the activity status for cancelled and completed schedule items is displayed as a prefix to the schedule item description (AFL-8157).

Improved interaction filter options for predefined reports

When specifying which activities should be included in the predefined contact Details report, you can now select multiple activity types and templates (AFL-7832, AFL-7958).

For more information, see "Predefined reports" in the end-user documentation.

New icon for tasks and the Tasks workspace

Through the application, the icon used for tasks, the Tasks workspace, Add Task menu items, and the Tasks reporting subject area has been changed to , to better reflect the functionality (AFL-8023).

Technology enhancements

This release includes the following technology enhancements:

- Loading efficiency for the **Schedule** workspace has been improved (AFL-8332).

Automation enhancements

This release includes the following automation enhancements:

- UI automated testing has been upgraded to use Selenium WebDriver 8.4.3 (EAF-314).

New features delivered in 23.02

The following features and enhancements were included as part of 23.02:

Treating leads as contacts

Prior to this release, leads were managed as separate records in NexJ CRM, and were converted to contacts only when they qualified. In this release, the new lead management feature allows you to add a contact with the Lead status instead. Using the Lead status for a contact is aligned with other contact statuses, which ensures the smooth transition of a contact through the client lifecycle. All lead management activities are synchronized between the contact profile accessed from the **Contacts** workspace and the lead profile accessed from the **Leads** workspace. For example, when you add an activity to the contact's profile, it is reflected in the lead's profile. When a lead profile is deleted, the contact profile is deleted as well (AFL-8102).

You can create new leads on either the **Contacts** workspace or the **Leads** workspace, as well as using the floating action button. When you create a new contact with the Lead status, you can specify lead-specific information, such as source type or market segment. You must also specify at least one phone number or email address (AFL-8040). You can see and update the lead-specific information for an existing contact on the Edit Contact dialog or on the Lead Details card on the **Details** tab on the contact's profile (AFL-8036).

When the pitch to the lead has reached a conclusion, you can choose either to archive the lead, which sets the lead status to Archived and the contact status to Other, or to convert the lead, which sets the lead status to Qualified and the contact status to Prospect (AFL-6363).

The existing lead management functionality (treating leads as separate entities) has been renamed to "Legacy Leads". It is still supported and is enabled by default. The new Leads as Entities feature is disabled by default. To enable this feature, in the Admin Console, navigate to the **Global Application Settings** page and disable the Legacy Leads feature.

For more information, see "Leads" in end-user documentation.

Displaying additional information about activities

When viewing a list of activities in a data table, you can now see the full notes associated with each activity (AFL-5476). The note is displayed as a new row, below the row with all other information about the activity. To include the notes rows in the data table, use the **Select columns** command (which may be accessed from the **More Actions** menu for the data table) to select the **Note** field.

This feature is currently supported only in the **Activities** tab on the **Contacts** workspace.

For more information, see "Activities" and "Adding notes" in end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

- A configuration dialog was added to ensure a user does not inadvertently lose changes when they select the **Cancel** or **Revert** button after configuring a report (CDM-5272).
- A subject area configuration parameter (pickerWhere) was added in order to allow filtering the list of Enumeration values seen in filter pickers (CDM-5213).
- A subject area configuration parameter (hideSpecificFilter) was added in order to allow hiding the **(Specific)** filter picker for select associated attributes where such picker would not display a unique list of values and may be confusing to users (CDM-5186).
- Two new buttons (**Cancel** and **OK**) were added to the Configure Filters dialog, replacing the single **Close** button that was previously available (CDM-5094).
- The style of the filter chip dialogs on the Reporting workspace was updated to better align with other NexJ CRM workspaces. Specifically, the filter dialogs pop up directly under their respective filter chip rather than in the center of the screen (CDM-5070).

Usability enhancements

This release contains the following usability enhancements:

- When creating a new schedule item from the **Schedule** workspace calendar, you can now select the schedule item template (including SLM schedule item templates) before the New Schedule Item dialog opens (AFL-8028).

- The About NexJ CRM dialog accessed from the **User settings** menu contains information about the current release, which may be required when communicating with your system administrator or NexJ Customer Support. This dialog now contains additional details, including the base revision and base model version numbers, in addition to the current revision and current model version numbers (ECRM-30895).

Object queue monitoring enhancements

- Performance optimization has been applied to the Object Queue Dispatcher's advance priority query (ECRM-31775).
- A system batch job has been added that will prevent the ExchangeStreamingQueue from growing beyond a threshold value to minimize potential excessive growth affecting other areas of the Object Queue Engine (ECRM-31788, ECRM-31571). The threshold value can be set on the Statistics page of the System Admin Console. Expand the node for your application (for example, nexj.finance), select Administration, and update the value for the `Streaming queue threshold` attribute.

Technology enhancements

This release includes the following technology enhancements.

- The React compatibility wrapper has been updated and requires React v18.0 or later (AFL-8146).

Security enhancements

This release includes the following security enhancements:

- The SecondString library has been upgraded to version 20120620 (ECRM-31726)
- The Apache Common Codec (Metaphone) library has been upgraded to 1.15 (released on August 28, 2020) (ECRM-31726)
- The jackson-databind library has been upgraded to 2.14.1 (released on November 22, 2022) (ECRM-31806)
- The Batik SVG Toolkit library has been upgraded to version 1.16 (released October 25, 2022) (ECRM-31707)
- The date.olson.db.js module has been upgraded to 2022g (released November 29, 2022) (AFL-8074)
- The AntiSamy library has been upgraded to 1.7.2 (released November 18, 2022) (ECRM-31705)
- The NekoHTML library has been upgraded to 2.66.0 (released October 22, 2022) (ECRM-31705)
- The IANA top level domain list has been updated to version 2023022700 (Last Updated Mon Feb 27 07:07:01 2023 UTC) (ECRM-31708)

This release also includes the following reporting security enhancements (CDM-5027):

- The Highcharts JavaScript library has been upgraded to version 10.0.0 (released on March 7, 2022)
- The jsPDF library has been upgraded to 2.5.1 (released on January 28, 2022)
- The jsPDF-AutoTable library has been upgraded to 3.5.25 (released on November 30, 2022)
- The JQuery library has been upgraded to 3.6.1 (released on August 26, 2022)

Enhancements for Cloud-deployed environments

This release includes the following enhancement for Cloud-deployed environments.

Storing file attachments in the IBM Cloud Object Storage S3 bucket

When NexJ CRM is deployed in a Cloud environment, your deployment can store file attachments in the IBM Cloud Object Storage S3 bucket for file persistence (AFL-7213).

New features delivered in 22.11

The following features and enhancements were included as part of 22.11:

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Additional sorting options for My Contacts' Recent Activities tab

On the Home workspace, in the **My Contacts' Recent Activities** tab, you can now sort the data table by activity start date and due date (AFL-8022).

New badge for contact birthdays

You can now see a badge indicating a current or upcoming birthday on a contact's profile banner (AFL-8032). By default, this feature is enabled on NexJ-hosted Cloud deployments and disabled on on-premises deployments. You can enable or disable this feature using the NexJ Admin Console, on the Entity Codes page in the **Badges** tab.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

User interface enhancements

This release includes the following enhancements to the user experience for ad hoc reporting.

Subject area displays in the Report Builder

The primary subject area for a report now displays in the banner in the Report Builder user interface (CDM-5061).

Attribute search enhancements

When you are searching for attributes in the Add Fields and Add Filters dialogs, the following functionality now applies (CDM-5022):

- Searching for an association shows all of its attributes when you expand the hierarchy.
- Searching for an attribute inside an association expands the association parent in the hierarchy.
- All matches for your search are displayed using bold text.

Improved messages

To assist users, the messages that indicate that an update is required in the **Summary** and **Visualization** tabs, and the report access error message, have been rewritten to include the required user responses (CDM-4882, CDM-4913).

Filtering enhancements

This release includes improvements to the filter user interface and functionality (CDM-5009). When you are adding filters in the **Details** tab in the Report Builder, you can now:

- Add filters and associated filters by clicking on attribute names in the Add Filters dialog or Configure filters dialog (CDM-5017).
- Edit filters or associated filters in the expanded Configure filters dialog (CDM-5018).
- Drag and drop filter and associated filter chips in the filters list to change their order (CDM-5066).
- Specify a Custom Logic expression for filters and associated filters to achieve even greater flexibility (CDM-5019, CDM-5065).
- Specify a WITH or WITHOUT associated filter to include data in a report based on the existence or non-existence of related records of the association subject area (CDM-5049).
- Select new negative filter operators that are specific to ad hoc reporting (CDM-5020).

For more information, see "Ad hoc reports" in the end-user documentation.

Application development enhancements

This release includes the following enhancements to application development functionality.

REST enhancements

Model Services now support the `$syntax=js|schem`e parameter. A simplified syntax is available for attributes and where clauses when `$syntax=js` is included as a parameter (ECRM-30764). You can represent enumerations using either code or values for the purposes of look-up, create, and update operations (ECRM-30763). The invoke implementation has been improved and now supports parameters passed in the request body, form-encoded, and as a JSON positional array or named map (ECRM-30765).

For more information, see Model services.

Technology enhancements

NexJ CRM 22.11 supports Java SE Development Kit 17 (JDK 17) (ECRM-31475).

For more information, see Requirements and support information (page 246).

Security enhancements

This release includes the following security enhancements:

- The googlei18n/libphonenumber library has been upgraded to v8.12.55 (released on September 8, 2022) (AFL-7955).
- The date.olson.db.js module has been upgraded to tzdata2022d (released 23 September 2022) (AFL-7954).
- The QUnit library has been upgraded to 2.17.2 (released September 20, 2021) (AFL-7297).

New features delivered in 22.09

The following features and enhancements were included as part of 22.09:

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Preview entity and activity summaries

You can now preview entity and activity records on the Contacts workspace and the Tasks workspace without needing to open their detailed view (AFL-7697). The preview shows the summary information about the record and allows you to navigate to the detailed profile for an entity or to view and edit all details for an activity.

You can use the new **Preview** button on each row of the data tables on Contacts workspace, the Activities tab on entity profiles, and the Tasks workspace to open a Preview sidebar on the left side on the workspace.

You can also open the previews for entities associated with an activity, by clicking the name of the entity in the **For** or **Assigned To** column on the Tasks workspace data table.

For more information, see "Navigating the NexJ CRM user interface" in the end-user documentation.

Batch process enhancements

You can now use the new Batch Processes workspace to view the status and details for batch jobs (AFL-6482). Batch processes that can be reviewed on the Batch Processes workspace including batch printing, batch emails, deleting multiple service requests, changing campaign participant status for multiple participants, and entity batch jobs such as updating custom fields, adding contacts to lists, or merging contact records.

For more information, see "Batch operations" in the end-user documentation.

Spell-checking in the rich text editor

When you are editing emails, notes, and documents in NexJ CRM in the rich text editor (CKEditor) in the desktop application, you can access the CKEditor native menu in the text body field by pressing CTRL+right-click, and you can select your spell-check settings. You can also press CTRL+right-click on misspelled words and select from the list of suggested corrections (AFL-7755).

For more information, see "Batch operations", "Adding notes", and "Managing documents" in the end-user documentation.

Rich text editing using mobile devices

NexJ CRM provides the mobile version of the rich text editor application (CKEditor) to make it easier to edit email and notes text on a mobile device when the screen size is reduced, and there is limited space (AFL-7474).

Navigating to a household member's profile

You can now navigate to the contact profile for household member from their household profile (AFL-7714). On the **Summary** tab, in the Members card, expand the household member record and click **Go to Contact**.

For more information, see "Households" in the end-user documentation.

Using email templates in campaigns

When defining a Send Email action in a campaign workflow or campaign workflow template, you can now indicate that an existing document should be used as the template for the email (AFL-6728).

For more information, see "Campaigns" and "Campaign workflow templates and participant statuses" in the end-user documentation.

Additional household communication methods

All communication methods that can be specified for a contact can now be specified for a household, including Home phone numbers, Mobile phone numbers, and email addresses that can be used to send SMS messages (AFL-7716).

For more information, see "Managing communication methods" in the end-user documentation.

Resetting the user interface

To clear the client state, which includes unsaved search and filter values and non-default data table preferences, click **User settings** on the application toolbar and select **Reset User Interface** (AFL-4764).

For more information, see "Navigating the NexJ CRM user interface" in the end-user documentation.

Improved interaction filter options for predefined reports

When specifying which interactions should be included in the predefined contact Details report, you can now select multiple interaction statuses (AFL-7830).

For more information, see "Predefined reports" in the end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

User interface enhancements

This release includes the following enhancements to the user experience for ad hoc reporting.

User feedback occurs when saving a report schedule

When you select a schedule frequency (for example, **Once**, **Daily**, **Weekly** or **Monthly**) for a report in the **Schedule** tab on the Reporting workspace, and click **Set Schedule** to save the schedule for a report, you can confirm that the saving of the schedule has worked as the next scheduled run time will appear below the **Set Schedule** button (CDM-4759).

For more information, see "Ad hoc reporting" in the end-user documentation.

Filtering reports by selecting specific association instances

When you want to filter for a specific association instance, you will now select a Specific <Association> in the **Filters** tab instead of an <Association> ID (CDM-4775).

For more information, see "Ad hoc reporting" in the end-user documentation.

New tooltips

When a header value or result value in the table in the **Summary** tab in the Report Viewer is long and does not display completely, you can hover over the header or result, and a tooltip displays that shows the full value (CDM-4862).

Support for complex filter expressions

You can create complex filter expressions using logical operators in the new **Filters** tab (CDM-4738).

For more information, see "Ad hoc reporting" in the end-user documentation.

Subject area configuration enhancements

Developers can configure the sort order for associations using the `sortOrder` parameter that will be applied when a selection dialog is displayed for filtering on specific associations (for example, the Enter (Specific) For filter dialog) in the **Filters** tab (CDM-4773).

For associations, developers can display the `name` attribute in filter selection dialogs for association instances by using the `pickerAttrs` parameter for those associations (CDM-4775). In addition, they can use this parameter to provide a comma-separated list of attributes that will also appear in the filter selection dialogs as table columns for these instances. These columns will help the user to select an instance by displaying information that is unique to each instance.

For more information, see Ad hoc reports development.

Sharing private reports with specified users

Previously, users had to make a report public in order to share it with other team members. Now, you can share private reports with specified users by selecting the **Unlisted** setting in the View and edit permissions settings for reports, and sharing the URLs for the saved reports (CDM-4717).

For more information, see "Ad hoc reporting" in the end-user documentation.

Specifying currencies on a per-report basis at report generation time

You can select the currency for a report on the Currency card in the **Settings** tab (CDM-4562). Selecting a currency will overwrite any default currency selection made by you in User Preferences for NexJ CRM or the system default setting.

For more information, see "Ad hoc reporting" in the end-user documentation.

Logging enhancements

You are now able to redirect the standard error and standard out log feeds to your choice of log4j appenders (ECRM-31560).

For more information, see Logging.

Security enhancements

This release includes the following security enhancements:

- Apache Tomcat libraries have been upgraded to version 8.5.82 (released by the Apache Software Foundation on August 8, 2022) (ECRM-31507)

NexJ System Admin Console enhancement

A **Clear Queue** button has been added to the **Object Queues** tab of NexJ System Admin Console, which cancels every message in the target queue, and deletes all waiting and blocked messages (ECRM-31547).

For more information, see Viewing messages for object queues.

New features delivered in 22.06.4

The following features and enhancements were included as part of 22.06.4:

Redirecting standard error and standard out log feeds

You are now able to redirect the standard error and standard out log feeds to your choice of log4j appenders. (ECRM-31560)

New features delivered in 22.06.1

The following features and enhancements were included as part of 22.06.1:

Reporting enhancements

Based on user feedback, NexJ has reverted the user interface changes made to add tabs to the Add Fields, Add Filters, and Add Groupings dialogs in NexJ CRM 22.06 (CDM-4923). As of 22.06.1, these dialogs no longer have tabs, and instead contain one list where users can select basic attributes, associations, and collections, as was provided previously with NexJ CRM 22.03, and 22.04.

For more information, see "Ad hoc reports" in the end-user documentation.

New features delivered in 22.06

The following features and enhancements were included as part of 22.06:

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Creating a new contact from the household members selection dialog

You can add a new member to a household from the Members card in the **Summary** tab on a household profile. Prior to this release, you could only select an existing contact to include in a household. You can now create a new contact from the Add a Household Member dialog (AFL-7423).

For more information, see the "Households" topic in the end-user documentation.

Selecting household addresses and communication methods for a contact

After you specify an address or a communication method for a household, you can now add that information to a contact's profile by selecting it from a list (AFL-7424, AFL-7454). The address or communication method can be added for every contact who is a member of that household, instead of typing in the information multiple times, with increased potential for errors. If you edit the information in the household profile or any household member's profile, the same changes apply in all other locations where the address or communication method has been specified.

For more information, see the "Managing addresses" and "Managing communication methods" topics in the end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

User Interface enhancements

This release includes the following enhancements to the user experience for ad hoc reporting.

Attribute selection dialogs

To help with adding fields or filters to a report, the Add Fields, Add Filters, and Add Groupings dialogs now have the following tabs (CDM-4506):

- Basic - attributes that hold only one value (for example, `Company Name`).
- Associations - attributes that hold more complex data (for example, `Business Address`). Click on the expand button ⌄ beside the name of an association to select from the basic attributes and associated objects that relate to an association.
- Collections - groups of related fields. Click on the expand button ⌄ beside the name of a collection to select from the basic attributes and associated objects that relate to a collection.

Tooltips

When a selected field value for a report is long and displays with an ellipsis (...), you can hover over the field in the Report Builder, and a tooltip displays that shows the full field value (CDM-4561).

Support for displaying nested collections

It is now possible to configure a report with nested collections; for example, for a Deals report you can select the Coverage collection, and the User > Telcoms subcollection (CDM-4695). The UI has been enhanced to provide a better user experience. For such reports, the CSV export functionality has been restricted to "expanding" collection attributes to multiple rows (CDM-4866).

For more information, see "Ad hoc reports" in the end-user documentation.

Default sort order of enumerations

By default, enumeration type attributes use the sort order that is defined in the NexJ CRM model (CDM-4833). For example, when you create a Deals report, you can add the **Stage** field that provides enumeration type attribute values that are predefined (for example, Closed, Initial, Planning and

Research). Enumeration type attributes are sorted in the same way as CRM in filters, groupings, sorting, and visualizations both in the reporting user interface, and exported files.

For more information, see "Ad hoc reports" in the end-user documentation.

Subject area configuration enhancements

Developers can specify additional filtering criteria that will always be applied in a report (for example, to exclude `Users` from a Contacts report) using a `whereClause` subject area configuration parameter (CDM-4737).

Similarly, developers can specify additional filtering criteria using the p `ickerWhere` parameter that will be applied whenever a selection dialog is displayed for filtering on specific associations using the `ID` attribute (CDM-4560).

Developers can hide the nested list of basic or association attributes that would otherwise be visible under an association. For example, in an Activities report, the "For" association has other attributes in its hierarchy, which include `Full Name` and `Last Name`. To hide this underlying hierarchy for an association in the Add Fields or Add Filters dialogs, developers can use the `hideHierarchy=true` subject area flag on an association (CDM-4792).

For more information, see Ad hoc reports development.

Security enhancements

This release includes the following security enhancement:

- The Highcharts JavaScript library has been upgraded to version 10.0.0, released by Highsoft AS on March 7, 2022 (AFL-7152).
- OWASP AntiSamy has been upgraded to version 1.6.5, released by the OWASP Foundation on Jan 31, 2022 (AFL-5580). For more information, see HTML sanitization.

New features delivered in 22.04.3.0

Object queue monitoring enhancements

- A **Clear Queue** button has been added to the **Object Queues** tab of NexJ System Admin Console, which cancels every message in the target queue, and deletes all waiting and blocked messages (ECRM-31547). For more information, see Viewing messages for object queues.
- A system batch job has been added that will monitor the depth of the ExchangeStreamingQueue and will clear it when a threshold has been exceeded

(ECRM-31775). This will allow the Object Queue Dispatcher to perform more efficiently when there are bursts of growth on the ExchangeStreamingQueue.

New features delivered in 22.04.2.0

The following features and enhancements were included as part of 22.04.2.0:

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Spell-checking in the rich text editor

When you are editing emails, notes, and documents in NexJ CRM in the rich text editor (CKEditor) in the desktop application, you can access the CKEditor native menu in the text body field by pressing CTRL+right-click, and you can select your spell-check settings. You can also press CTRL+right-click on misspelled words and select from the list of suggested corrections (AFL-7755).

For more information, see "Batch operations", "Adding notes", and "Managing documents" in the end-user documentation.

New features delivered in 22.04

The following features and enhancements were included as part of 22.04:

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Displaying additional household member information in household profiles

You can now see household member birth date and salutation in household profiles (AFL-7247). In a household profile, navigate to the **Summary** tab. In the Members card, expand the record for each household member to view their date of birth and their preferred name to be used in salutations (displayed in the **Dear** field).

For more information, see "Households" in the end-user documentation.

Sorting batch print output

When you print a document that includes merge fields for a list of entities, the output of the batch print job is now sorted in alphabetical order (AFL-7332). Batch print job reports are sorted by last name and first name for contacts, and by company name for companies. When you print multiple documents for the same list of entities, the order of records in each report will be the same.

For more information, see "Batch operations" in the end-user documentation.

Displaying path information for documentation folders in campaigns

The Select a folder dialog, which opens when you select the **Folder** field in the New Campaign or Edit Campaign dialog, now displays the Document Manager path for the folder, in addition to the folder name (AFL-7294).

Recording driver's license and passport information

You can now record driver's license and passport information on a contact's profile (AFL-7009). This information is displayed on the Identifications card on the **Detail** tab.

For more information, see "Managing identifications" in the end-user documentation.

Saving the client state for search and filtering

Starting with this release, the client state for text search and filter cards is saved when you log off or close your browser (AFL-2811). This means that the next time you log in, the text and filter values from the previous search are displayed. The client state is only saved for the last active filter.

For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Viewing reminder details

When you are viewing an alarm for a schedule item or task in the Reminders dialog, you can display more about the schedule item or task in the application sidebar (AFL-7044). You can also edit the details for the schedule item or task from the sidebar.

For more information, see "Schedule items" or "Tasks" in the end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

CSV export enhancements

A new method of flattening collection data when a report is exported to CSV was introduced. In addition to previously supported functionality, it is now possible to collapse collection attributes to a single row using a semicolon delimiter (CDM-4728). Your system administrator can control the default behavior for all users in NexJ CRM System Admin Console.

For more information, see Configuring ad hoc reporting settings.

User-configurable report settings

A new **Settings** tab (which replaces the **Schedule** tab) was introduced to consolidate advanced end-user facing configuration for a report. All parameters found on the **Settings** tab are configured and saved on a per-report, per-user basis (CDM-4729).

Configuration related to scheduling report execution can now be found on the Schedule card.

On the Export card, you can select an option that specifies how collection fields for a report will be exported in a CSV file. These options determine if collection fields in an exported CSV file are expanded to multiple rows, and whether common fields are repeated, or whether collection fields are collapsed to a single row using a delimiter. When you select an option, your selection will overwrite the default settings in NexJ CRM System Admin Console.

For more information, see "Ad hoc reports" in the end-user documentation.

New features delivered in 22.03.1.0

The following features and enhancements were included as part of 22.03.1.0:

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality:

CSV export enhancements

A new method of flattening collection data when a report is exported to CSV was introduced. In addition to previously supported functionality, it is now possible to collapse collection attributes to a single row using a semicolon delimiter (CDM-4728). Your system administrator can control the default behavior for all users in NexJ CRM System Admin Console. For more information, see Configuring ad hoc reporting settings.

User-configurable report settings

A new **Settings** tab (which replaces the **Schedule** tab) was introduced to consolidate advanced end-user facing configuration for a report. All parameters found on the **Settings** tab are configured and saved on a per-report, per-user basis (CDM-4729).

Configuration related to scheduling report execution can now be found on the Schedule card.

On the Export card, you can select an option that specifies how collection fields for a report will be exported in a CSV file. These options determine if collection fields in an exported CSV file are expanded to multiple rows, and whether common fields are repeated, or whether collection fields are collapsed to a single row using a delimiter. When you select an option, your selection will overwrite the default settings in NexJ CRM System Admin Console.

For more information, see "Ad hoc reports" in the end-user documentation.

New features delivered in 22.03

The following features and enhancements were included as part of 22.03.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Initiating a call from a phone number

When a phone number is displayed in an entity's banner or Communications card in the user interface, you can click on it to initiate a call when using a mobile device or when you have configured a phone application for the Desktop client (AFL-7255).

For more information, see "Contacts, companies, households, and users " and "Managing communication methods" in the end-user documentation.

Rich text support for documents and notes

The following changes have been made to enhance the support for rich text :

- You can now include rich text formatting in documents, including notes, created on the Document Manager workspace or added to a contact, opportunity, or service request (AFL-6780). Rich text allows your documents to contain formatting such as bold or italic fonts, bulleted or numbered lists, images, or tables.
- Notes added to a record using the Notes card are created and displayed in plain text. You can now click the **View/Edit** button for the note to edit it using rich text (AFL-7221).

This feature is enabled using the `crm.document.richTextEnabled` environment variable.

For more information, see "Adding notes" and "Managing documents" in the end-user documentation.

Campaigns enhancements

This release includes the following enhancements to the Campaigns functionality:

- You can now add activity plans as workflow actions to campaigns and campaign templates (AFL-7330).
- The tasks and meetings that can be added as workflow actions to campaigns and campaign templates now include Service Level Management activities (AFL-7312).

For more information, see "Campaigns" and "Campaign workflow templates and participant statuses" in the end-user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting user interface:

- The **Cancel** button has been added to all dialogs in the **Details** and **Summary** tabs in the Report Builder (CDM-4538).
- You can search for a field in the Add Calculation Field dialog (CDM-4636).
- The scheduling functionality for reports has been moved from the **About** tab to a new **Schedule** tab (CDM-4537).
- Additional validation logic has been added to ensure saving a report does not result in an error. Before you can save a report, you must add at least one field to the report, and you must specify values for all selected filters (CDM-4621).

For more information, see "Ad hoc reports" in the end-user documentation.

Aggregation enhancements

After you have added a number, date, or timestamp field to a report in the Report Builder in the **Details** tab, you can select the field and add it as a calculation by selecting the **Add Field as Calculation** menu option, and selecting a field and operator in the Add Calculation dialog (CDM-4539).

In the **Summary** tab, you can select collection fields for calculations (CDM-4614). For example, you can select the **Related Activities > Start Time** collection field as a calculation.

For more information, see "Ad hoc reports" in the end-user documentation.

Scheduling enhancements

You can schedule dashboards to run once, at a future date and time, or periodically, and share dashboards using email (CDM-4540).

It is now possible to specify an end time for a report or dashboard schedule configuration (CDM-4536).

For more information, see "Ad hoc reports" in the end-user documentation.

Restricting the visibility of subject areas using privilege names

When developers are designing subject areas for reports, they can control which reports can be viewed by users in the UI, and which subject areas are available for selection when users are creating reports in the UI, by assigning privilege names to subject areas (CDM-4547).For more information, see Ad hoc reports development.

Configuring the maximum PDF file size for email attachments

You can change the maximum file size allowed for PDF file attachments that are shared by email for reports and dashboards in NexJ System Admin Console (CDM-4651).

For more information, see Configuring ad hoc reporting settings

Application development enhancements

This release includes enhancements to application development functionality.

NexJ Studio upgrade

As of 22.03, NexJ Studio has been upgraded to use Eclipse 2021-09, and requires JDK 11 as a prerequisite for installing it (ECRM-31030).

For more information, see Setting up NexJ Studio.

Enabling users to display more records in data tables

You can enable users to display 20 or more items in all data tables using the **Items per page** drop-down in the user interface by configuring the global `pageSizeMultiplier` attribute in your environment file (AFL-5058). For more information, see Example environment settings for NexJ CRM deployment. You can also use the optional table view `multiplier` property to enable users to display 20 or more items in a specific table. For more information, see Table.

Hiding the Apache Tomcat server version on HTTP error pages and hiding Tomcat error reports

You can hide the Apache Tomcat server version number on HTTP error pages using the `hideErrorValveServerInfo` attribute in your environment file. You can also hide the presentation of the Apache Tomcat server error report when an error occurs using the `hideErrorValveReport` attribute (ECRM-31281).

For more information, see Example environment settings for NexJ CRM deployment.

Adding tooltips to icons

When adding an icon to a table column, a list item, or a label, you can now specify a tooltip (AFL-4434).

For more information, see Adding and updating icons.

NexJ Admin Console enhancements

The following enhancements have been made to NexJ Admin Console.

Deactivating critical system users

As of 22.03, administrators cannot deactivate critical system users in NexJ Admin Console that are responsible for background processes (ECRM-31185).

For more information, see Configuring users.

Inform enhancements

Support for curated feeds and ability to manage news feeds

Both curated and non-curated feeds are now supported and can be used to generate relevant article lists (INFORM-3). Curated feeds allow users to select client interests from a globally defined list of available interests. Non-curated feeds allow users to define any word or short phrase as an interest that can be added to a client's profile. Depending on which feed is used, Inform appearance and behavior may vary slightly. For more information, see "Inform" in end-user documentation.

Administrators can use the new Feeds workspace to select which news feed should be used in your deployment and to specify feed details (INFORM-45). For more information about using the Feeds workspace, see "Managing Inform Feeds" in administrator documentation.

Profile details

In addition to articles related to client interests, you can also view articles related to the client's contact name and company name (INFORM-160, INFORM-108). The user must be assigned the inform:ProfileDetailView privilege to enable this feature. For more information, see "Inform" in end-user documentation.

Support for companies

The **Inform** tab is now displayed on the profile view for both contacts and companies (INFORM-161). For more information, see "Inform" in end-user documentation.

Simplified privileges

Privileges for the Inform product in the NexJ-AI Suite have been revised to simplify enabling this feature for different users (INFORM-191). For more information about the new inform:gInformUser and inform:gInformAdmin privilege groups, see NexJ CRM privileges.

Security enhancements

This release includes the following security enhancements (ECRM-31165 and AFL-7107):

- The date.olson.db.js module has been upgraded to tzdata 2021e (released by IANA on October 22, 2021).
- The CKEditor application has been upgraded to 4.17.1 (released by CKSource sp. z o.o. sp.k. on November 17, 2021).
- The googlei18n/libphonenumber library has been upgraded to 8.12.40 (released by Google on December 23, 2021).
- The activemq-core library has been upgraded to 5.15.15 (released by Apache on April 28, 2021).
- The kafka-clients library has been upgraded to 3.0.0 (released by Apache on September 21, 2021).
- The Kafka-avro-serializer has been updated to 6.2.1 (released by confluent.io on September 23, 2021).
- The Jackson library has been upgraded to 2.10.5 (released by FasterXML on July 20, 2020).

New features delivered in 22.01

The following features and enhancements were included as part of 22.01.

Campaigns enhancements

This release includes the following enhancements to the Campaigns feature functionality (AFL-7022):

You can now create custom participant statuses for campaign workflows, in addition to using the default statuses.

The two statuses that are used for specific steps in the campaign flow were not updatable prior to this release. You can now update these statuses to reflect your company processes:

- The default status for all participants when the campaign is in the Planning stage By default, the Targeted status is used.
- The initial status for all participants when the campaign has started and the campaign stage has changed to In Progress. By default, the Contacted status is used.

These changes can be made on the Customize workspace in the **Campaigns** tab.

For more information, see the "Campaign workflow templates and participant statuses" topic in end-user documentation.

Security enhancements

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 21.12.2.0

The following features and enhancements were included as part of 21.12.2.0.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting user interface:

- The scheduling functionality for reports has been moved from the **About** tab to a new **Schedule** tab (CDM-4537).
- You can specify an end date and time for a report's schedule in the **Schedule** tab (CDM-4536).

For more information, see "Ad hoc reports" in the end-user documentation.

New features delivered in 21.12.1.0

The following features and enhancements were included as part of 21.12.1.0.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality (CDM-4534, CDM-4535).

It is no longer necessary to edit a report in order to see the selected attributes and filters. As of 21.12.1.0, you can view which fields and filters have been selected for a report in the **About** tab in the Report Viewer.

Additionally, when you add filters for object ID attributes in the **Details** tab in the Report Builder, you can select from the following operators: `equals`, `not equals`, `specified`, `unspecified`.

For more information, see "Ad hoc reports" in the end-user documentation.

Security enhancement

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 21.12

The following features and enhancements were included as part of 21.12.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Filter usability improvements

The following filter usability improvements have been made (AFL-6000):

- You can now dismiss a filter selection dialog by clicking anywhere on the screen outside the dialog, in addition to dismissing a dialog by clicking **Cancel**.
- When you click on a filter chip to open a selection dialog, the filter chip to which the dialog applies is highlighted by displaying a border in an accent color.
- When you click on a filter chip, the selection dialog is displayed directly below the chip to which it applies, instead of being displayed in the middle of the screen.
- Some selection dialogs include filter chips, which can open an additional selection dialog. For example, the Select an entity filter dialog includes a City filter chip. If you click on the nested filter chip, the dialog that opens now displays over the original filter dialog. You can click **Back** on the nested dialog to return to the original dialog without applying your changes.
- The selection dialogs are now more compact, because the operator and the value have been moved to the same line where possible.

For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Customize workspace tabs for configuring rules and business processes

Application administrators can view and configure rules and business processes using the new tabs provided on the Customize workspace (AFL-2607).

- Rules specify the criteria for when an action, such as sending a notification, is triggered. Use rules to automate simple tasks or to send notifications and alerts. Use the new **Rules** tab to view, activate, and deactivate rules. Click the **Manage Rules** button to open the Manage Rules application in a new tab. You can use the Manage Rules application to create, edit, or delete rules.
- Business processes are workflows that consist of one or more approval steps and an optional form, used to record and update information about clients. Use the new **Business Processes** tab to view, activate, and deactivate business process templates. Click the **Manage Business Processes** button to open the Manage Business Processes application in a new tab. You can use the Manage Business Processes application to create, edit, or delete business process templates.

For more information, see "Rules" and "Business process templates" in the application administration documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality.

As of 21.12, you can also report on Campaigns and Households subject areas (CDM-4497 and CDM-4498).

For more information, see "Ad hoc reports" in the end-user documentation.

Campaigns enhancements

Campaign workflows are used to associate each participant status in a campaign with actions that will be automatically performed when a participant is assigned that status. This release includes the following enhancements to the campaign workflow functionality:

- You can now create workflow templates using the **Campaigns** tab on the Customize workspace. Creating a workflow template simplifies the process by allowing end users to load a predefined template instead of defining each status individually for every new campaign. After a template is loaded, the end user can customize the workflow as appropriate (AFL-6740).
- Previously, the only actions that could be associated with a participant status in a workflow included creating a task, creating a meeting, creating an opportunity, and sending an email. Starting with this release, you can also associate the "print document" action with a participant status (AFL-6844).

For more information, see "Campaigns" in the end-user documentation and "Campaign workflow templates" in administrator documentation.

Application development enhancements

This release includes the following enhancements to application development functionality.

Support for en_US locale

By default, NexJ CRM uses the en locale, which displays dates in the Canadian format (day/month/year). You can now choose to enable the new en_US locale to be able to display dates in the US format (month/day/year). This will allow users to select either Canadian or US English locales in the User Preferences dialog. This feature is not enabled by default (AFL-6455).

For more information, see Enabling en_US language support.

Custom sizing and positioning of NexJ CRM dialogs

By default, NexJ dialogs try to maximize the usage of available screen space. Disabling this behavior is now supported by adding a query string parameter to the target URL (AFL-6833).

For more information, see Custom sizing and positioning of NexJ CRM dialogs.

Security enhancements

This release includes the following security enhancements (ECRM-31010):

- The dom4j library has been upgraded to version 2.1.3 (released on April 12, 2020).
- The tomcat-coyote and tomcat-util libraries have been upgraded to 8.5.69 (released by Apache Software Foundation on July 5, 2021).
- The Pdfbox library has been upgraded with security updates from version 2.0.15 (released by the Apache Software Foundation on April 11, 2019).

Technology enhancements

The following enhancements have been made for application development and to expand browser support.

Support for Microsoft Edge web browser

NexJ CRM version 21.12 supports using the Microsoft Edge web browser for the NexJ CRM desktop application (AFL-6013).

For more information, see Certified configurations, supported platforms, and hardware and software requirements (page 246).

New features delivered in 21.09

The following features and enhancements were included as part of 21.09.

Security enhancements

This release includes the following security enhancements:

- The tomcat-coyote and tomcat-util libraries have been upgraded to 8.5.69 (released by the Apache Software Foundation on July 5, 2021).
- The googlei18n/libphonenumber library has been upgraded to v8.12.25 (released June 16, 2021).
- The date.olson.db.js module has been upgraded to tzdata2021a (released January 24, 2021).

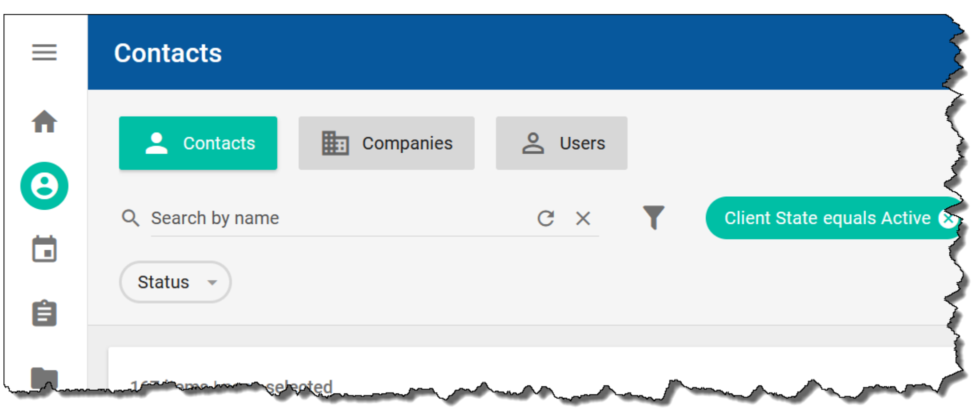
New features delivered in 9.9.0

The following features and enhancements were included as part of 9.9.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

In addition to the existing behavior, when you provide a value in the text search field on the Home, Contacts, Document Manager, Tasks, and Service Level Management workspaces, you can click on the **Refresh** button in the text search field to perform the search with a single click. The following screenshot shows the **Refresh** button.



For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Targeted activity plans

An activity plan is a predefined sequence of activities that can be created for a client, rather than creating each of the activities individually. Prior to this release, you could create an activity plan consisting of a number of ordered steps. Each step's creation depends on the creation or completion of the previous step.

Starting with this release, you can also create a targeted activity plan, which consists of one target activity step and multiple other steps, which are all created relative to the target activity, not to each other.

To use a targeted activity plan:

1. An administrator first creates a targeted activity plan template and specifies the target activity. The other steps are scheduled to be created either before or after the target activity, based on the target activity create or due date.
2. An advisor then adds the activity plan for a client. The target activity and other activities are created for the contact according to their defined schedules and assigned to users as appropriate.

For more information, see "Activity plan templates" in the administration documentation, and "Activities" in the end-user documentation.

Application development enhancements

This release includes enhancements to application development functionality.

Font libraries upgrades

When developing NexJ applications, icons are specified as text characters, not as image files. The text characters are stored in font files as part of the NexJ CRM project. This release includes new and updated Material Design Icons font files.

For more information, see Adding and updating icons.

Changes to notifications and clock drift tolerance

As of NexJ CRM 9.9, the following changes have been made to notifications and clock drift values:

- Notifications are automatically adjusted from the alert module by the amount of the clock drift, which means that notifications will appear according to the server time and not the client time.
- The tolerance for when a warning dialog is shown for the clock drift value has been increased from five seconds to five minutes.

For more information, see Configuring clock drift tolerance for notifications.

Scheme editor syntax highlighting improvement

When defined in events, services, and unit tests, library function arguments in the Scheme editor in NexJ Studio are now highlighted (bold green).

Security enhancements

The jackson-databind library has been upgraded to 2.8.11.6 to include recent security updates and bug fixes.

The NexJ single sign-on system has been extended to support cross-server SSO deployments for multiple NexJ server instances. For more information, see Configuring servers for cross-server SSO.

New features delivered in 9.8.5

The following features and enhancements were included as part of 9.8.5.0.

Security enhancement

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 9.8.4

The following features and enhancements were included as part of 9.8.4.0.

Application development enhancements

This release includes the following enhancements to application development functionality.

Custom sizing and positioning of NexJ CRM dialogs

By default, NexJ dialogs try to maximize the usage of available screen space. Disabling this behavior is now supported by adding a query string parameter to the target URL (AFL-6833).

For more information, see Custom sizing and positioning of NexJ CRM dialogs[2].

2 https://confluence.nexj.com/display/PUBDEV9/.Launching+NexJ+CRM+dialogs+from+third-party+applications+v9.8#id-.LaunchingNexJCRMdialogsfromthirdpartyapplicationsv9.8-customsizingandpositioningofnexjcrmdialogs

New features delivered in 9.8.3

The following features and enhancements were included as part of 9.8.3.0.

Application development enhancement

This release includes the following enhancement to application development functionality.

Changes to notifications and clock drift tolerance

The following changes have been made to notifications and clock drift values:

- Notifications are automatically adjusted from the alert module by the amount of the clock drift, which means that notifications will appear according to the server time and not the client time.
- The tolerance for when a warning dialog is shown for the clock drift value has been increased from five seconds to five minutes.

For more information, see Configuring clock drift tolerance for notifications.

New features delivered in 9.8.2.2

The following features and enhancements were included as part of 9.8.2.2.

Application development enhancements

This release includes enhancements to application development functionality.

Hiding the Apache Tomcat server version on HTTP error pages and hiding Tomcat error reports

Use the `hideErrorValveServerInfo` attribute in your environment file and `hideErrorValveReport` attribute to hide the Apache Tomcat server version number on HTTP error pages, and hide the presentation of the Apache Tomcat server error report (ECRM-31281). The following table provides further information:

Attribute	Description	Value
`hideErrorValveReport`	Hides the presentation of the Apache Tomcat server error report when an error occurs by configuring the Tomcat `ErrorReportValve` class. When it is set to `false` by default, the error report is returned in the HTML response.	false
`hideErrorValveServerInfo`	Hides the presentation of the Apache Tomcat server version information when an error occurs by configuring the Tomcat `ErrorReportValve` class. When it is set to `false` by default, the server version is returned in the HTML response.	false

New features delivered in 9.8.2.1

The following features and enhancements were included as part of 9.8.2.1.

Security enhancement

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 9.8.1

The following features and enhancements were included as part of 9.8.1.0.

Service Level Management

NexJ Service Level Management feature allows firms to administer a prescribed customer engagement model, and design programs that address the unique service needs of each client segment.

Users can track the level of support that they provide to their clients, based on the service model which defines how often client interactions of different types should occur. Service models are assigned based on the contact's tier, but can be customized for each client.

This feature can be accessed in the following locations in NexJ CRM:

- The Service Level Management workspace displays a list of all touches that belong to your contacts.
- The Contacts workspace
 data table view allows you to search for contacts based on their service level and update the service level for multiple contacts at once.
 The Contacts workspace profile view allows you to view and manage the service model for
- the selected contact, on the Service Model card in the **Summary** tab.

Administrators can define service levels, touch types, and intervals, and associate service levels with client tiers using the Admin Console, on the **Service Level Management** page.

Additional reporting functionality is also provided with this feature and is described below.

For more information, see "Service level management" in the end-user documentation and Configuring Service Level Management settings.

Reporting enhancements

This release includes the following enhancements to the reporting functionality.

Ad hoc service level management reports

Support for the Service Level Management subject areas has been added to the Reporting workspace. Users can now generate ad hoc reports based on the following new subject areas:

- Contact Touches (any touches that have occurred or are expected to occur for a contact)
- Touch Activities (any activities that are associated with a touch type)

For more information, see "Ad hoc reports" in the end-user documentation.

Predefined SLM Touches Report

Users can generate the new predefined SLM Touches Report from either the Contacts workspace or the Service Level Management workspace.

In addition, service model information is included in the predefined Contact Detail Report.

For more information, see "Predefined reports" in the end-user documentation.

New features delivered in 9.8.0.3

The following features and enhancements were included as part of 9.8.0.3.

Application development enhancements

This release includes the following enhancements to application development functionality.

Custom sizing and positioning of NexJ CRM dialogs

By default, NexJ dialogs try to maximize the usage of available screen space. Disabling this behavior is now supported by adding a query string parameter to the target URL.

For more information, see Custom sizing and positioning of NexJ CRM dialogs.

Changes to notifications and clock drift tolerance

The following changes have been made to notifications and clock drift values:

- Notifications are automatically adjusted from the alert module by the amount of the clock drift, which means that notifications will appear according to the server time and not the client time.
- The tolerance for when a warning dialog is shown for the clock drift value has been increased from five seconds to five minutes.

For more information, see Configuring clock drift tolerance for notifications.

New features delivered in 9.8.0

The following features and enhancements were included as part of 9.8.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Birthday and Date of Birth filter chip operator enhancements

As of NexJ CRM 9.8, you can use the "in the previous (days)" and "in the next (days)" operators with the **Birthday** and **Date of Birth** filter chips.

For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Entity management enhancement

This release includes an enhancement to the entity management functionality.

Batch print birthday mailers

NexJ CRM enables you to filter contacts with upcoming birthdays, print birthday mailers for one or more contacts based on third-party mailer templates, and add additional items for the action including journal entries and follow-ups.

Your administrator can enable the Birthday Mailer feature, assign you the BirthdayMailerView privilege required to print birthday mailers, provide third-party mailer template tokens as custom tokens for NexJ CRM merge fields, and import mailer templates into NexJ CRM Document Manager.

For more information, see "Batch operations" in the end-user documentation and Providing custom tokens and templates for mailer documents in the technical documentation.

Campaigns feature enhancements

Workflows to automate activities related to a campaign

A *workflow* for a campaign specifies the actions that should be executed for each campaign participant based on their status. Define a workflow to associate a possible action with each campaign participant status.

For example, you can define the Not Interested status without an associated action and the Interested status associated with the Create Opportunity action. When a campaign participant's status is set to Interested, an opportunity is automatically created for them.

For more information, see "Campaigns" in the end-user documentation.

Campaign team members to support different roles

You can specify campaign team members, who are users responsible for executing the campaign, and associate each team member with one or more roles.

For more information, see "Campaigns" in the end-user documentation.

Application development enhancements

This release includes enhancement to application development functionality.

Including remote portlets in your application's workspaces

When you are running an application on a NexJ server, you can now include a portlet running on another NexJ server within one of your application's workspaces.

For more information, see Including a remote portlet in your application.

Technology enhancements

This release includes the following technology enhancements.

Mailbox folder states preserved

The following enhancement has been made for Microsoft Exchange Server mailboxes:

Folder states are preserved when migrating mailboxes to another Exchange Server.

Support for Microsoft SQL Server 2019

NexJ CRM now supports Microsoft SQL Server 2019.

For more information, see Requirements and support information (page 246).

New features delivered in 9.7.0

The following features and enhancements were included as part of 9.7.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Reordering user schedules list

You can change the order of the schedules that display for other users on the Schedule workspace.

For more information, see "Schedule items" in the end-user documentation.

Selecting search criteria for filter chips enhanced

After you have selected filter fields to display as new filter chips, the filter dialog where you define search criteria launches immediately to reduce user actions.

For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Entity management enhancement

This release includes an enhancement to the entity management functionality.

Importing contacts

Business administrators can import contact records into a staging area in NexJ CRM. When they are importing contacts, they must create an import package containing one or more CSV files, as well as information mapping the data in the file to the correct fields in NexJ CRM. Business administrators and end users can then review and correct the information, check to see if it matches any existing contacts, and complete the import.

For more information, see "Preparing contact import data and importing contacts" in the application administration documentation and "Imported contact data" in the end-user documentation.

NexJ System Admin Console enhancements

This release includes the following enhancement to NexJ System Admin Console.

Run-time logging

The ability to set cluster-wide logging levels at run time has been added to NexJ System Admin Console for NexJ Server. This convenience feature simplifies the troubleshooting process and is geared towards accelerating issue resolution time.

For more information, see Run-time logging in NexJ System Admin Console.

Application development enhancements

This release includes enhancements to application development functionality.

Configuring the maximum display width for filter chips

Developers can configure the maximum display width for the content of filter chips (the operator and value) using a theme property.

For more information, see UI themes and CSS.

Improvement to the out-of-the-box Attachment model

A new calculated attribute, "path", has been added to the Attachment metaclass to facilitate tasks related to exporting CRM attachments. This automatically calculated attribute helps determine the physical location of CRM attachments saved to a file system. The attribute is primarily intended for use by NexJ Data Bridge or other data migration processes. The attribute becomes available for use when the file persistence adapter is enabled.

Technology enhancements

The following enhancements have been made for application development.

Support for CORS

You can enable Cross-Origin Resource Sharing (CORS) headers to be set on an application server response to allow requests from other origins, and from which a browser should permit loading of resources. For more information, see Upgrading to NexJ CRM version 24.05.

Support for Oracle Database 19c

NexJ CRM now supports Oracle Database 19c.

For more information, see Requirements and support information (page 246) and Upgrading to NexJ CRM version 24.05.

Support for IBM WebSphere Application Server 8.5.5.18

NexJ CRM now supports WebSphere Application Server Version 8.5.5 Fix Pack 18.

For more information, see Requirements and support information (page 246).

New features delivered in 9.6.5

The following features and enhancements were included as part of 9.6.5.0.

Security enhancement

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 9.6.2

The following features and enhancements were included as part of 9.6.2.0.

Creating campaigns

A *campaign* represents a set of common activities that are used as a marketing initiative to help firms plan, manage, and track efforts to acquire new clients or retain existing clients.

Campaigns enable you to retain existing customers and acquire new clients:

- Target your marketing efforts and then personalize marketing communications for each customer.
- Make proactive product and service recommendations based on analyzing your book of record.
- Use the added efficiency to increase the number of opportunities closed.

You can use the new Campaigns workspace to create and update campaigns, select campaign participants, and keep track of documents and opportunities related to the campaign.

For more information, see the "Campaigns" topic in the end user documentation.

Creating activity plan templates and activity plans

An *activity plan* is a predefined sequence of activities that can be created for an entity, rather than creating the activities individually. This allows for efficient processes that have a standard set of required steps. At the same time, each activity that is created through an activity plan is particular to that specific entity.

You can now create activity plan templates in the Customize workspace. Each template has steps, which could be tasks, meetings, or documents. After a template is created, you can add an activity plan based on the template to an individual entity on the Contacts workspace. This creates the activities for the entity and assigns them appropriately to team members.

New features delivered in 9.6.1

The following features and enhancements were included as part of 9.6.1.0.

NexJ CRM user experience enhancements

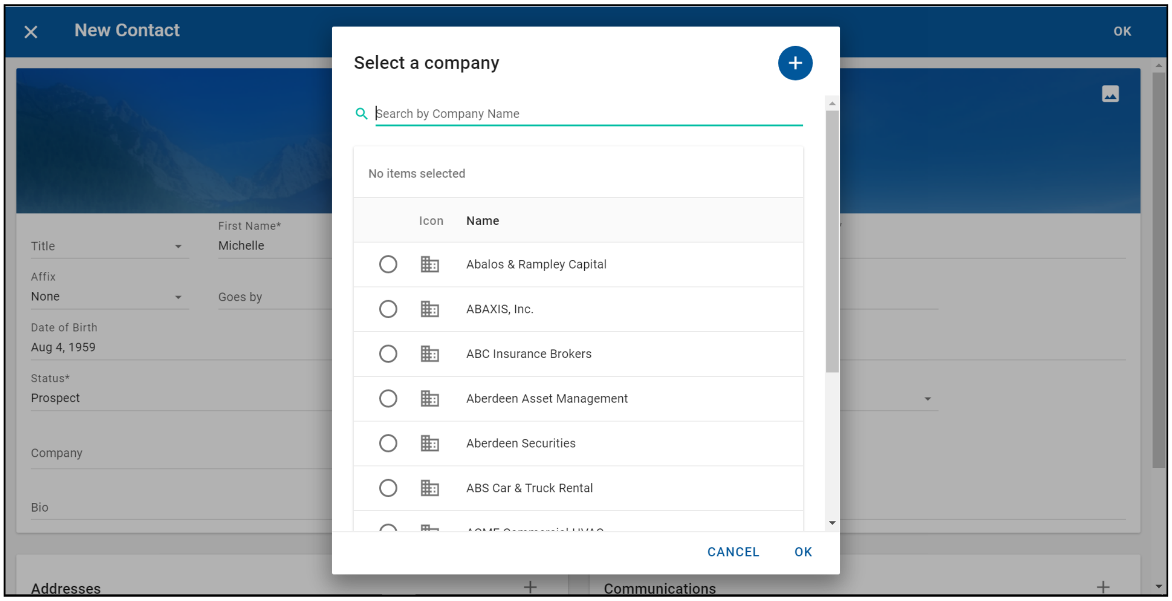
This release includes the following enhancements to the user experience.

Creating new entities from selection dialogs

Users are now able to create a new entity from within a selection dialog if the target entity does not already exist. The following cases are available:

- Contact - create a new **Company**
- Company - create a new **Parent** company
- Schedule Item, Task, Document, Call Record - create a new entity in the **For** field
- Opportunity, Service Request - create a new entity in the **For** field or in the **Contacts** tab

The following screenshot shows how when you are adding a new contact you can also add a new company by clicking the **Add a new item** button ⊕ in the Select a company dialog, entering the company information in the New Company dialog, and saving your changes to add the required company.



Similar custom use cases are readily configurable.

For more information, see "Navigating the NexJ CRM user interface," "Adding contacts and companies," "Activities," "Tasks," "Schedule items," "Service requests," and "Creating and managing opportunities" in the end-user documentation, and Multipicker and Picker in the technical documentation.

Streamlined user tasks by turning off default confirmation dialogs for some user actions

When you add a filter or list in the Filters and lists data table, or edit a filter or entity list and then cancel your changes, you are no longer prompted for confirmation of your actions. Also, you are no longer prompted when you choose to export data records from the data table on the Contacts workspace but decide to cancel without exporting.

Reporting enhancements

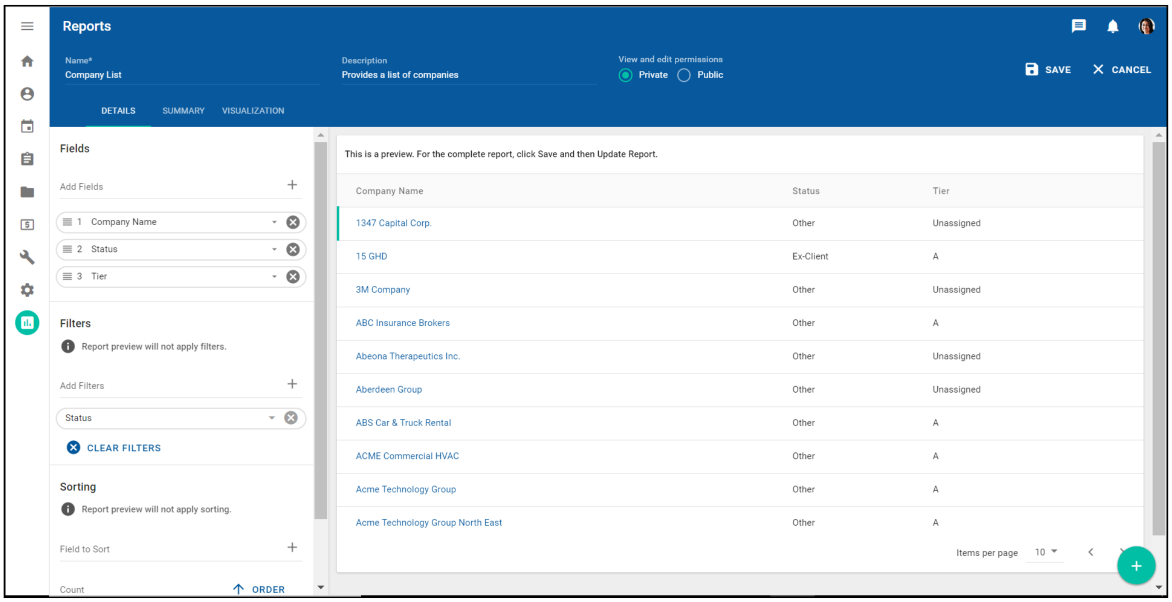
This release includes the following enhancements to the ad hoc reporting functionality.

Improved Report Builder user interface

The following changes have been made to the Report Builder user interface to simplify the user experience:

- The banner now includes new View and edit permissions radio buttons (**Private** and **Public**).
- Filters selection has been moved to the **Details** tab in the report settings pane on the left-hand side of the Report Builder and the **Filters** tab has been removed.
- A new **Visualization** tab has been added to the report settings pane where you can define chart values for your data.
- The preview pane automatically displays the relevant details when you select the **Details**, **Summary**, or **Visualization** tabs in the report settings pane.

The following screenshot shows the changes made to the Report Builder:



For more information, see "Ad hoc reports" in the end user documentation.

Application development enhancements

This release includes enhancements to application development functionality.

Extended support for static html pages

In addition to supporting the *.htm extension for static html pages, you can now use the *.html extension.

For more information, see Static web resources.

New features delivered in 9.6.0

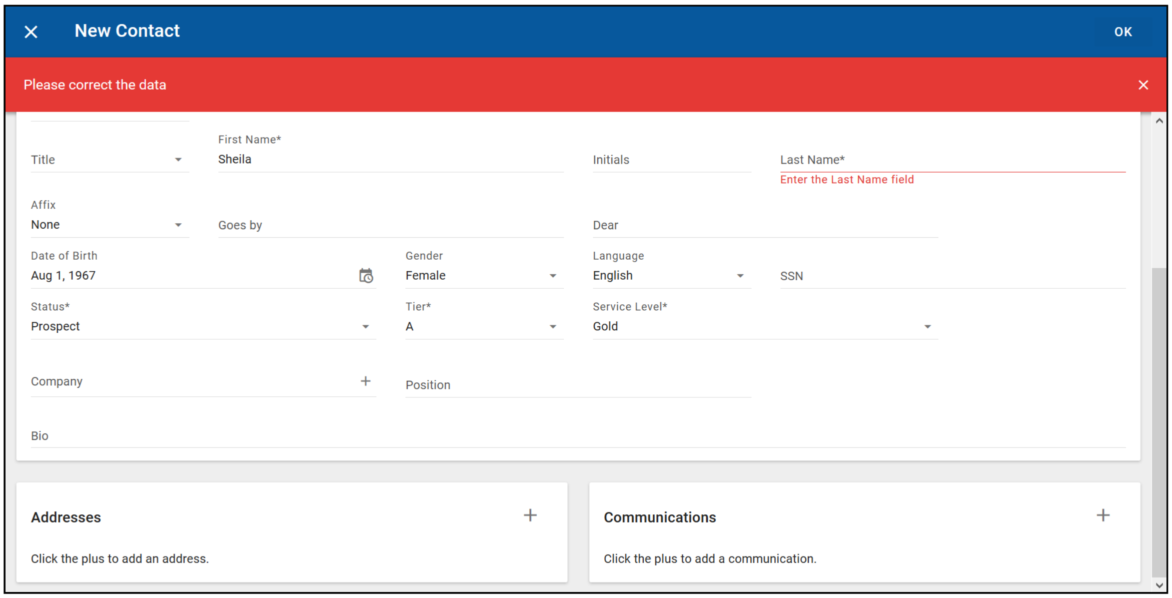
The following features and enhancements were included as part of 9.6.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Error message banner is persistent

The error message banner remains visible when you have scrolled within a dialog. For example, if you are adding a new contact, forget to provide a last name, scroll down to the end of the dialog, and click **OK**, you will still see the following error message banner:



For more information, see "Navigating the NexJ CRM user interface" in the end user documentation.

Reordering column selections for data tables

In the Select columns to display dialog for data tables, you can change the ordering of the selected columns by clicking the up and down arrow buttons. Columns that are not pinned can be reordered.

For more information, see "Navigating the NexJ CRM user interface" in the end user documentation.

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Binding forms for external enumerations and pickers using REST APIs

NexJ CRM now supports binding Process Management forms with an external model (REST schema) for external enumerations and external objects that display items in pickers.

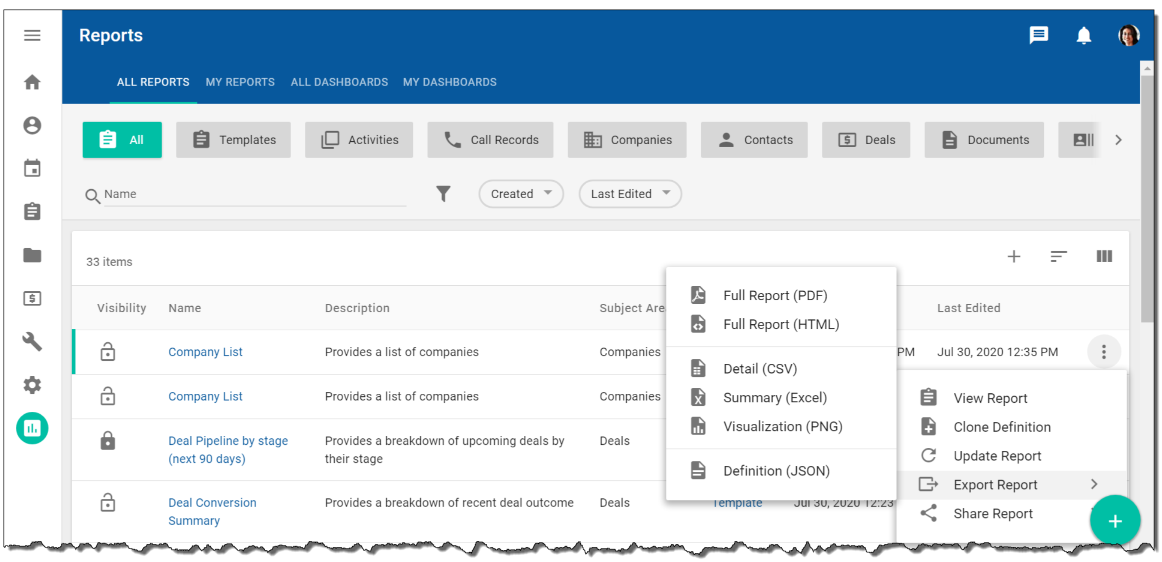
For more information, see Developing forms using REST APIs.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality.

Exporting reports without first opening them

You no longer need to open a report to export it. Instead, you can click the **More Actions** button for a report in the reports data table and select the required export option.



For more information, see "Ad hoc reports" in the end user documentation.

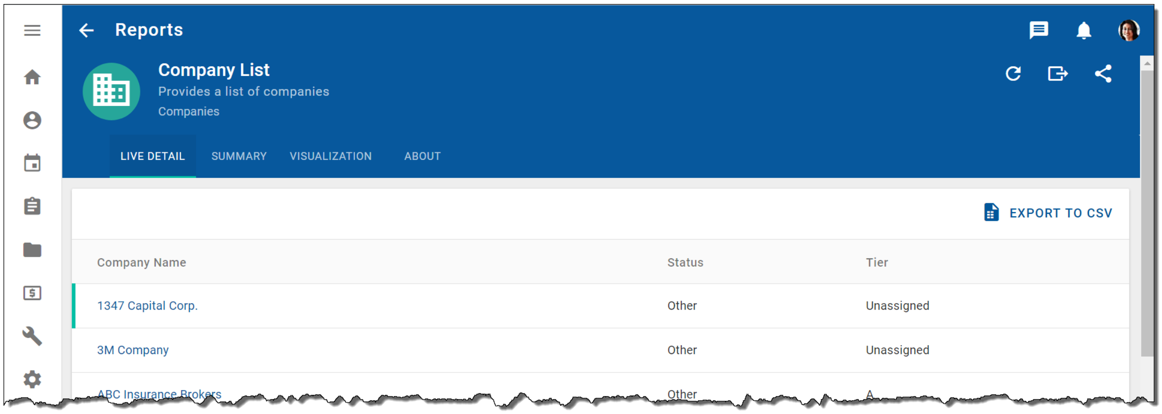
Exporting reports to PDF

As of NexJ CRM 9.6, you can export individual reports in PDF format.

For more information, see "Ad hoc reports" in the end user documentation.

Exporting data or visualizations using new export buttons

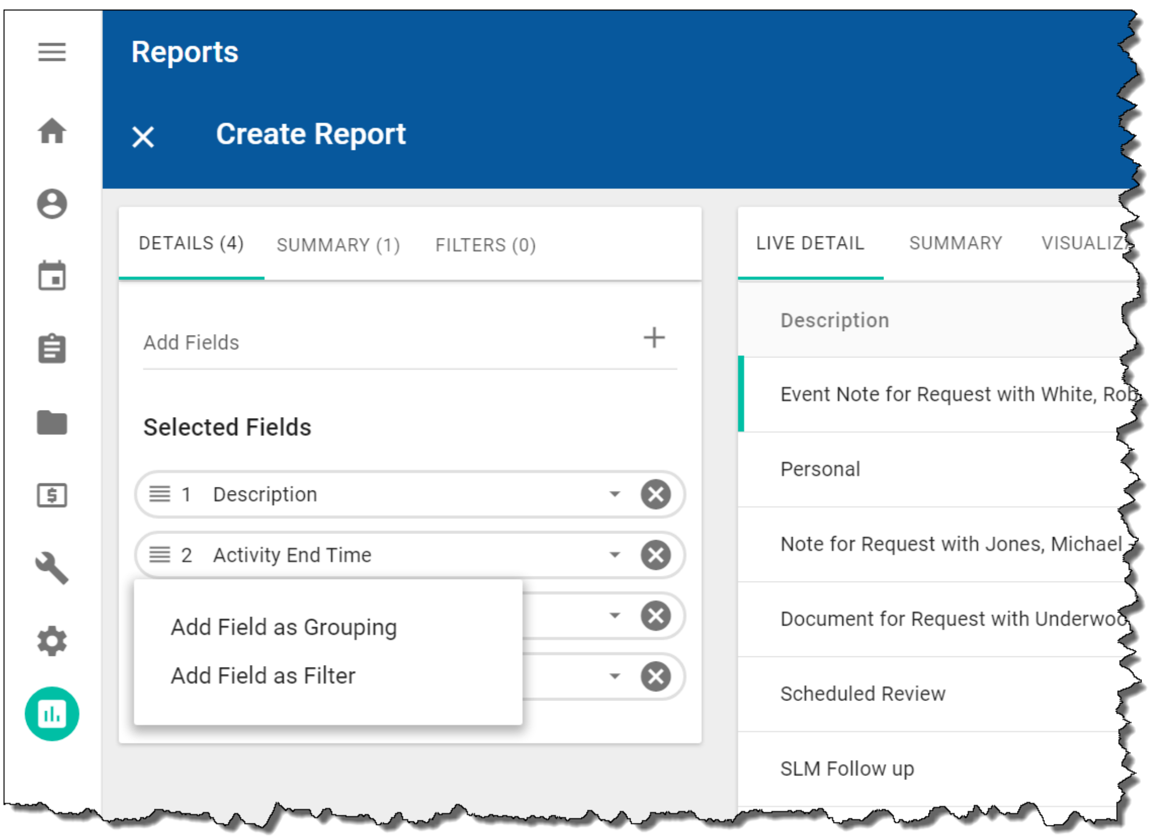
New export buttons are provided so you can quickly export data from the **Live Detail**, **Summary**, and **Visualization** tabs. For example, the **Live Detail** tab now includes the **Export to CSV** button.



For more information, see "Ad hoc reports" in the end user documentation.

Quickly adding fields as groupings and filters

In the **Details** tab, you can quickly add fields as groupings or filters by selecting a field (for example, **Activity End Time**) and selecting either the **Add Field as Grouping** or **Add Field as Filter** menu option. The following screenshot shows the new menu options.



For more information, see "Ad hoc reports" in the end user documentation.

Sharing reports and dashboards by copying URLs

You can copy the URL for a report or dashboard to your clipboard and then paste it into the required application to share the report or dashboard with other users.

You can also email reports to other users.

For more information, see "Ad hoc reports" in the end user documentation.

Configuring exports for ad hoc reports

System administrators can configure exports for ad hoc reports and dashboards in the Statistics page in NexJ System Admin Console. They can configure the:

- Maximum number of collection columns for CSV exports
- Maximum number of rows for CSV exports
- Maximum number of dashboard detail report rows to output when exporting to HTML
- Maximum number of dashboard detail report rows to output when exporting to PDF

They can also configure CSV exports to flatten the data in exported spreadsheets so that the spreadsheet columns do not contain duplicated collections data.

For more information, see Configuring ad hoc reporting settings.

Including multiple collections as part of a CSV export

You can include multiple collections as part of your CSV export. For example, you can include attributes from both the Assign To and For collections for an activity-based report.

For more information, see "Ad hoc reports" in the end user documentation.

Enabled filtering, grouping, and calculations for fields not selected for display

As of NexJ CRM 9.6, you can select filters, groupings, and calculations without first having to select fields in the **Details** tab. Your selections are no longer limited by your field selections in the **Details** tab.

For example, you can group a Deals report using the Stage grouping without having selected the **Stage** field. The **Stage** field will not show in the **Live Detail** tab for the report.

For more information, see "Ad hoc reports" in the end user documentation.

Exporting a report's JSON definition is secured to an administrative privilege

As of NexJ CRM 9.6, only report administrators can export a report's JSON definition.

For more information, see NexJ CRM privileges.

Configuring the Report Adapter replication transaction recovery rate

The NexJ Report Adapter is responsible for replicating NexJ CRM transactions to the ad hoc reporting database. If changes fail to synchronize from CRM to the Reporting database due to a transient condition (for example, a network service interruption), they will be queued and retried. The retry rate is controlled by the exponential backoff settings.

You can configure exponential backoff and retry settings for messages failures for ad hoc reports on the Statistics page in NexJ System Admin Console.

For more information, see Configuring ad hoc reporting settings.

Performance statistics for Reporting data replication recovery

You can review performance statistics for Reporting data replication recovery on the Statistics page in NexJ System Admin Console in a standalone Reporting environment on the Reporting server.

For more information, see Reviewing performance statistics for Reporting data replication recovery

Using a proxy server for Exchange Online OAuth

NexJ CRM 9.6 supports the use of a proxy server for Exchange Online OAuth.

For more information, see Channel settings for a NexJ CRM deployment with Exchange Online.

New features delivered in 9.5.1

The following features and enhancements were included as part of 9.5.1.0.

Using a proxy server for Exchange Online OAuth

NexJ CRM 9.5.1 supports the use of a proxy server for Exchange Online OAuth.

For more information, see Channel settings for a NexJ CRM deployment with Exchange Online.

New features delivered in 9.5.0

The following features and enhancements were included as part of 9.5.0.0.

NexJ CRM user experience enhancements

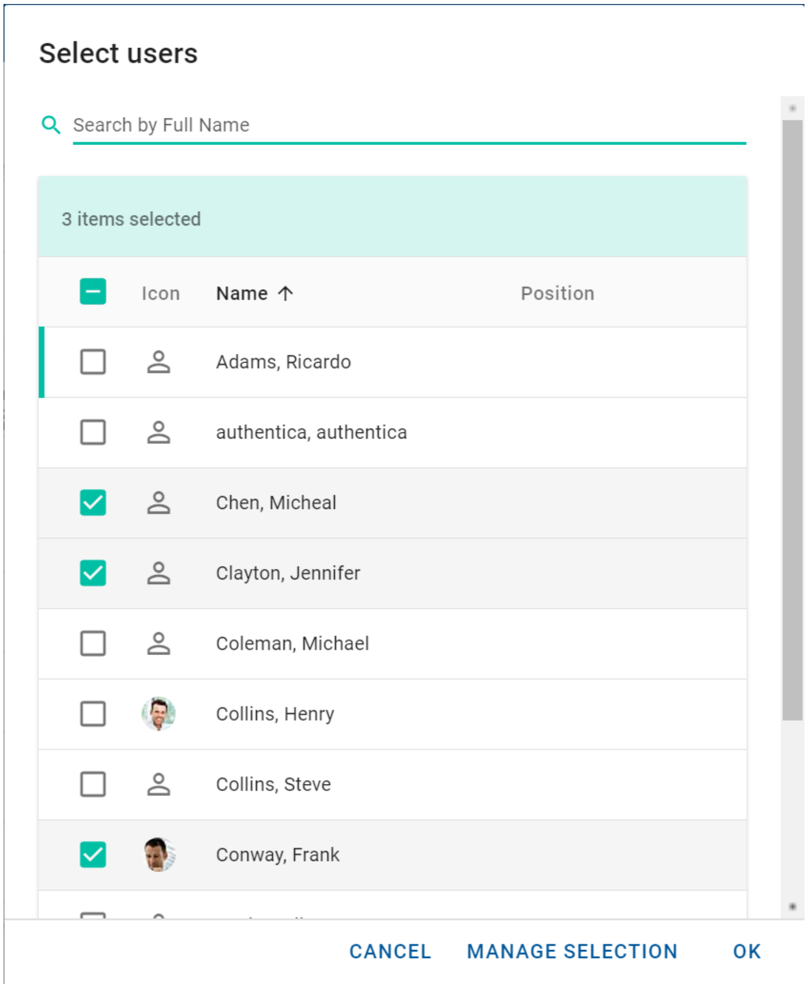
This release includes the following enhancements to the user experience.

Pagination summary added to data tables

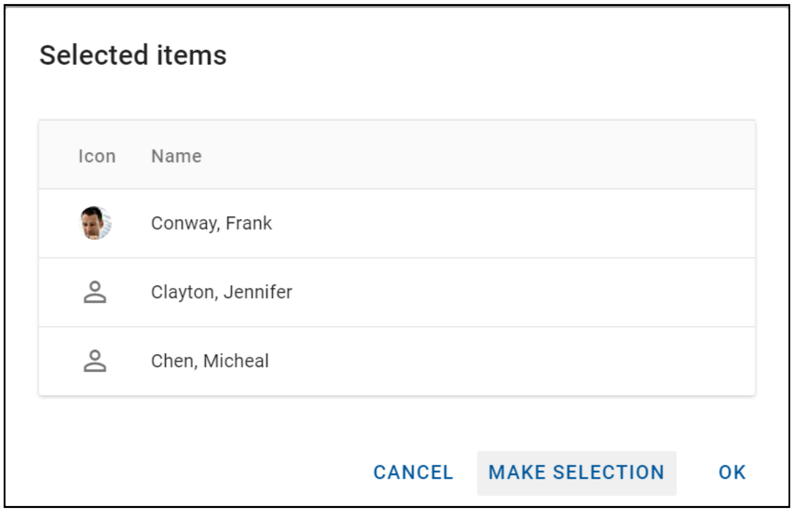
A pagination summary has been added to data tables to display the range of rows currently in view along with the total number of rows. For example:

Reviewing your selections in multiple selection dialogs

After you have made selections in multiple selection dialogs, you can review your selections by clicking **Manage Selection**. For example, if you assign a task to multiple users in the Select users dialog by selecting their checkboxes, as shown in the following screenshot:



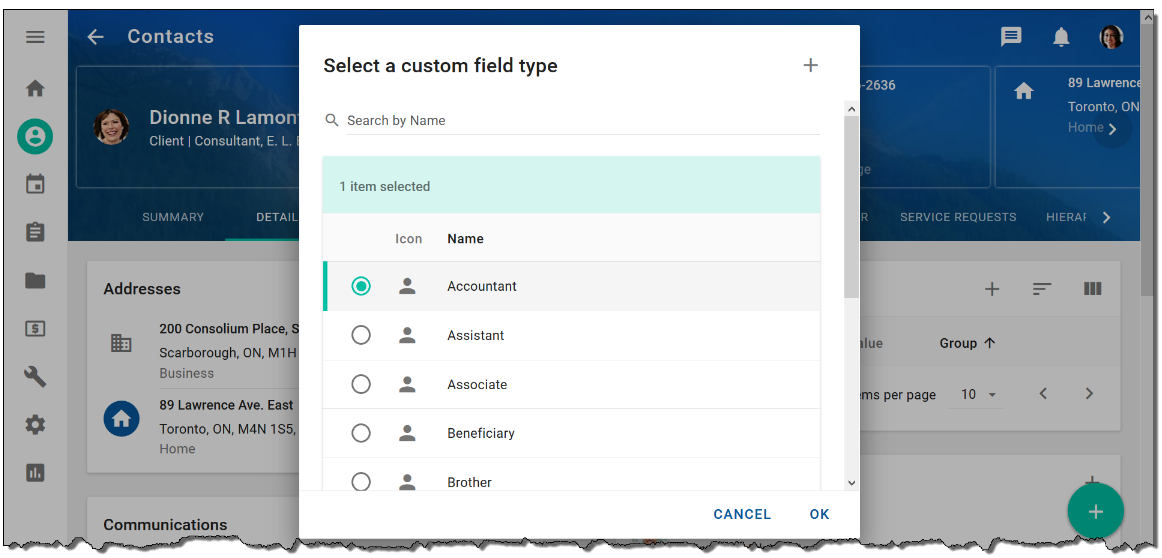
and you click **Manage Selection**, a dialog opens where you can review your selections, as shown in the following screenshot:



For more information, see "Navigating the NexJ CRM user interface" in the end user documentation.

Single selection dialogs display tables

To create a consistent user experience, single selection dialogs now incorporate tables. For example:



Loading more articles in Inform

The **Inform** tab can display up to 20 articles at a time. To view more articles, click the **Load More** button at the bottom of the article list.

For more information, see "Inform" in the end user documentation.

Identifying Inform articles that have been previously sent to a contact

If you select an article in the **Inform** tab that has been previously emailed to a contact, and click **Email**, you will receive a message asking if you want to send the article again.

For more information, see "Inform" in the end user documentation.

Managing reminders for tasks and schedule items

Reminders for tasks and schedule items are enabled by default. You can disable reminders for tasks and schedule items by navigating to the **Reminders** tab in the User Preferences dialog, and clearing the checkboxes to disable them.

For more information, see "Navigating the NexJ CRM user interface" in the end user documentation.

Deactivating or reactivating multiple entities in a batch update

You can also deactivate or reactivate multiple entities at a time in a batch update.

For more information, see "Deactivating and activating entities" in the end user documentation.

Table control page size stored in the client

Prior to the 9.5 release, when a user chose the page size for a data table, it was not saved. As of 9.5 release, the page size is stored in the client state for each data table.

For more information, see Table.

Additional sorting capability in the Customize workspace

The ability to sort on columns has been expanded across the tabs of the Customize workspace.

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Developing forms using REST APIs

You can use the REST APIs provided by NexJ Systems to develop forms.

For more information, see Developing forms using REST APIs.

Configuring dynamic approvals

Administrators can now define dynamic approvals based on Process Management form data. When users submit Process Management forms that have been configured for dynamic approvals, the forms are automatically directed to the required approvers.

For more information, see "Business process templates" in the end user documentation.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality.

Deploying Reporting in a dedicated cluster mode

NexJ Reporting is now supported in a deployment configuration that enables a dedicated application cluster and database.

For more information, see Setting up ad hoc reporting and Enabling or disabling the replication of changes from NexJ CRM to Ad Hoc Reporting databases.

Creating public dashboards

Report administrators can create public dashboards templates that can be cloned by users to create their own dashboards.

For more information, see "Ad hoc reports" in the end user documentation.

Running ad hoc reporting on an Oracle stack

You can now run the reporting module using either a Microsoft SQL Server or Oracle database.

For more information, see Requirements and support information (page 246).

Exporting dashboards

To share dashboards outside of NexJ CRM or print them, you can export dashboards in HTML or PDF file formats.

For more information, see "Ad hoc reports" in the end user documentation.

Internet Explorer supported by ad hoc reporting

As of the NexJ CRM 9.5 release, you can use the Reports workspace in the Microsoft Internet Explorer and Google Chrome browsers.

OAuth 2.0 authentication supported for Exchange Online

As of the 9.5 release, NexJ Systems provides OAuth 2.0 token-based authentication with Microsoft Exchange Online for increased security, and as an alternative to Basic Authentication, which Microsoft will disable in the near future.

For more information see, Using Microsoft Exchange Online with OAuth authentication.

Library upgrades

Several third-party libraries used by NexJ CRM have been upgraded to include the latest respective bug fixes and security updates.

Batch email to entity lists using REST APIs

The mailing list REST APIs provided by NexJ Systems enable external systems to:

1. Retrieve a collection of entity lists (saved lists) from NexJ CRM for a given user.
2. Email content generated in the external system to the entities in a saved list that was retrieved in the previous step.

For more information, see Developing batch email capabilities using REST APIs.

Application development enhancements

This release includes enhancements to application development functionality.

UI automated testing

UI automation has been upgraded to use Selenium WebDriver 3.

For more information, see Environment setup and customization.

NexJ AFL Presentation API documentation

Next Studio online help includes the new "NexJ AFL Presentation API Reference NexJ AFL Presentation Layer 13.9.15.0" document, which describes the Application Foundation Layers (AFL) user interface metadata. When you need to invoke a function on mda.Controller, or a different AFL user interface object, you can review this document to find the list of available functions.

Logging enhancements

Apache Tomcat provides the ability to log any request thread that has been processing for more than some specified period of time by setting the `org.apache.catalina.valves.StuckThreadDetectionValve` parameter in the `server.xml` file. This feature is available in NexJ Model Server.

You can enable the valve by setting the `stuckThreadThreshold` attribute in your environment file to a positive integer. When the valve is enabled, logging occurs for NexJ Model Server web requests that run longer than the set threshold (measured in seconds).

For more information, see Detecting long-running web requests[3] and Example environment settings for NexJ CRM deployment.

Security enhancements

The Model Server HTTP connectors now support TLS 1.2, which is enabled by default. Client certificate authentication now works and is supported on the push server.

New features delivered in 9.4.7

The following enhancement was included as part of 9.4.7.0.

Security enhancement

This release includes the following security enhancement (ECRM-30956):

- The Log4j library has been upgraded to 2.17.1 (released by the Apache Software Foundation on December 28, 2021).

New features delivered in 9.4.0

The following features and enhancements were included as part of 9.4.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Managing the profile images for contacts and companies

You can add, modify, and delete profile images for contacts and companies. The profile images display in the entity banner on the detail pages for contacts and companies and in data tables. For more information, see "Adding contacts and companies" in the end user documentation.

3 https://confluence.nexj.com/display/PUBDEV9/.Detecting+long+running+web+requests+v9.5

Observing interface loading progress

The visual indicator of loading progress has been extended to dialogs, including multiple selection dialogs. As you open a dialog, a green progress indicator below the dialog title indicates that it is loading.

Reordering favorite filters

You now have the ability to change the order in which selected favorite filters appear. For more information, see "Searching and filtering in NexJ CRM" in the end-user documentation.

Entity management enhancements

This release includes enhancements to entity management functionality, including the ability to manage account plans for companies and share articles of interest with clients.

Manage account plans for companies

Use account plans to define goals and objectives for accounts, track planning activities, and ensure that plans are being executed as expected.

> Account plans are available for companies but not for other entity types.

You can use account plans to define goals and objectives for accounts, track planning activities, and ensure that plans are being executed as expected. From a company's **Account Plans** tab, you can:

- Identify plans that are active and plans that have expired
- Add opportunities to account plans
- Add activities to track interactions with internal and external stakeholders related to the account plan
- Track predefined risks that are associated with an account plan
- Directly attach and remove files associated with an account plan
- Specify a list of competing companies

For more information about creating accounts plans, see "Account plans" in the end user documentation.

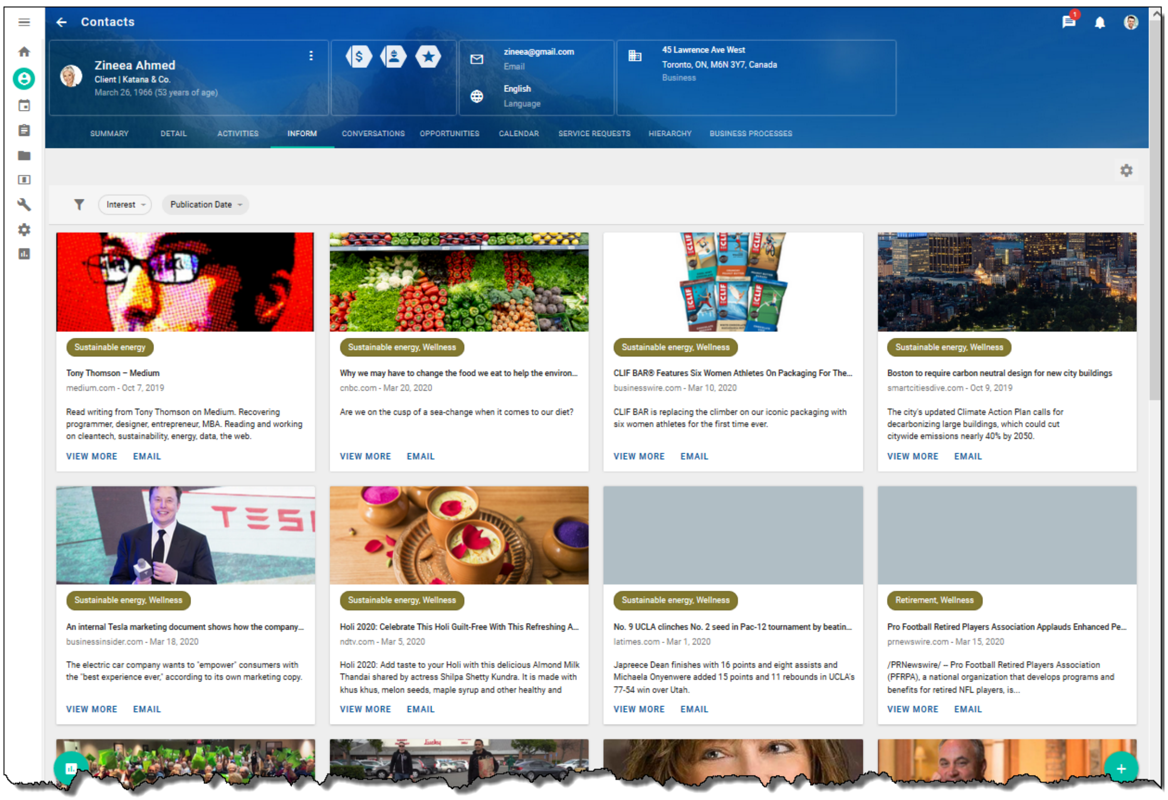
Share articles of interest with contacts

Inform is a product in the NexJ Nudge-AI suite. It matches news articles from 15,000 public news feeds and firm-specific research to a contact based on their news interests. Users share this content over a variety of digital and social channels, build strong relationships with their clients based on value-added interactions, influence the customer journey, and identify new opportunities for sales and service.

Key capabilities include:

- Configure relevant interests for a selected contact in the **Inform** tab on their detail page.
- View relevant articles based on the contact's interests; use filters to refine the article list.
- Share articles with the contact by email.

The following image shows an example of articles displayed in the **Inform** tab when the user has selected sustainable energy, wellness, and retirement as interests.



For more information about using Inform, see "Inform" in the end user documentation.

For more information about deploying Inform, see Deploying Inform.

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Localizing forms

You can localize Process Management forms. When you provide string translations, you can create forms in languages other than English. If no string translations are available, the forms default to English.

For more information about form localization, see Developing Process Management forms.

Reporting enhancements

This release includes the following enhancements to the ad hoc reporting functionality.

Reordering values in chart visualizations

You can now reorder individual values on a chart in Ad hoc reports. The **Reorder Category** button, the **Reorder Y-Axis** button, and the **Reorder X-Axis** button are visible for certain fields (for example, **Stage**), and the label of the button depends on the chart selected.

For more information about reordering values in a chart, see "Ad hoc reports" in the end user documentation.

Collections support

Collections are now supported in Ad hoc reports. A *collection* is a field that can have a one-to-many relationship, and, therefore, can contain more than one value. It can be identified by the collections icon in the Add fields dialog. If you select a collection field in the Add fields dialog (for example, the **Activities** field for a Contacts report), and expand the field to select related fields (for example, **Activity End Time** or **Activity Start Time**), the report displays the fields of the collection grouped by the subject area (for example, interactions grouped by contacts).

In reports, collections can be identified by their default fields. The default field is displayed in reports to represent the selected collection whether the default field is selected or not (for example, the default field for the **Activities** collection is the **Description** field).

Collections are now included in **Export Detail** for a report and are displayed in the **Live Detail** tab. Also, you can click collections in data tables (for example, on the **Live Detail** tab) to allow you to view the related fields of the collection that were added to the report.

For more information about using collections in reports, see "Ad hoc reports" in the end user documentation.

Currency conversion support

You can select a currency in the User Preferences dialog to convert the monetary values of your Deals reports into your preferred currency.

For more information about currency conversion for reports, see "Ad hoc reports" in the end user documentation.

Technology enhancements

The following enhancements have been made for application development and to expand browser support.

REST API v2 and Inform

REST API v2 support has been introduced in this release. It is required by Inform functionality to communicate with NexJ CRM. For more information, see Enabling and configuring REST API v2.

Support for Internet Explorer 11 web browser

NexJ CRM version 9.4 supports Microsoft Internet Explorer 11.

New features delivered in 9.3.0

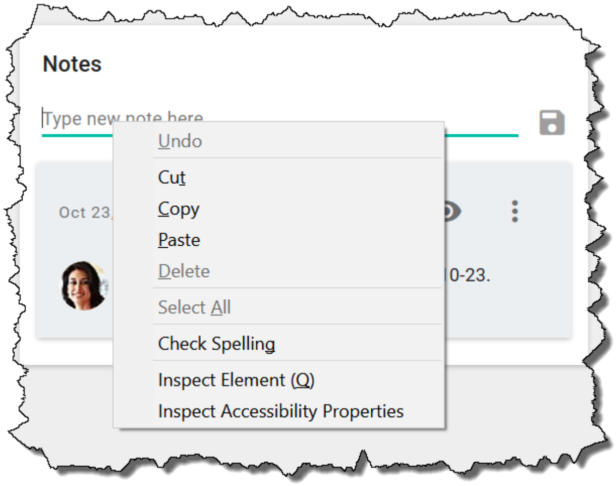
The following features and enhancements were included as part of 9.3.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Browser right-click menu is enabled

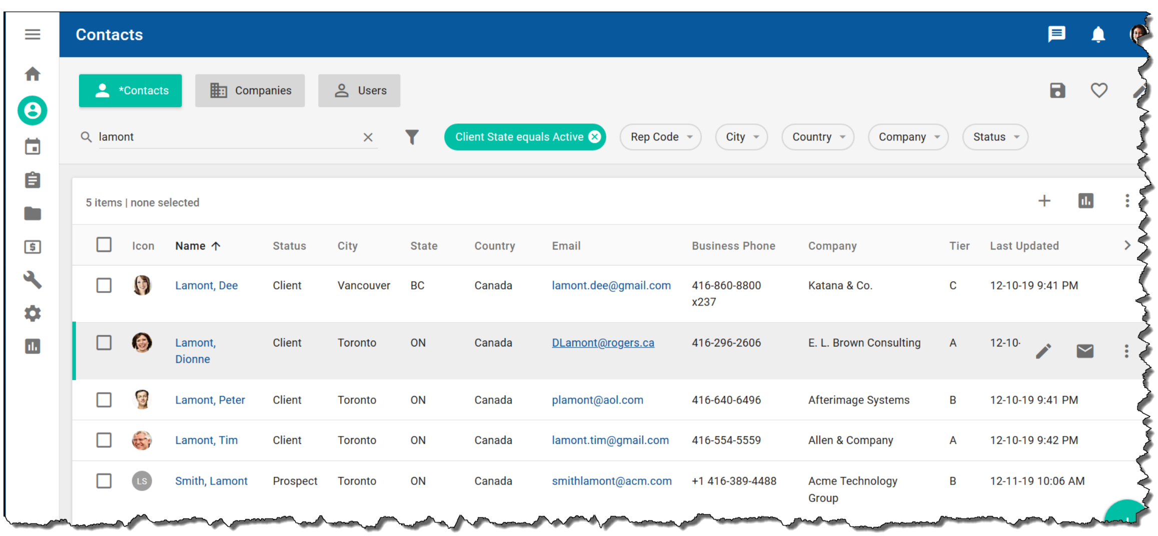
You can now use the browser right-click menu within input fields. This simplifies common tasks such as pasting copied text into **Notes** fields and spell-check.



Searching for contacts and users

The text search functionality for contacts and users has been enhanced. When you are using text search to find contacts or users, you can now enter their first name or last name in the search field to retrieve data records in the data table on the Contacts workspace.

The following screenshot shows an example of a search for all contacts who have a first or last name of "Lamont."



For more information, see "Searching and filtering in NexJ CRM" in the end user documentation.

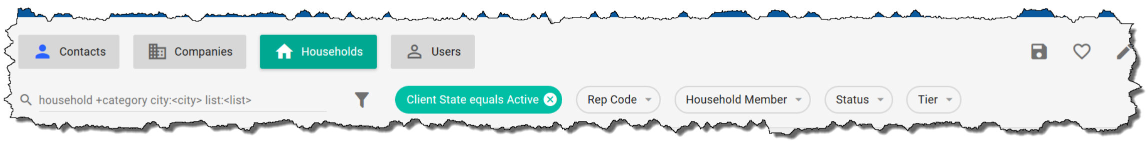
Entity management enhancements

The NexJ CRM entity management functionality has been enhanced.

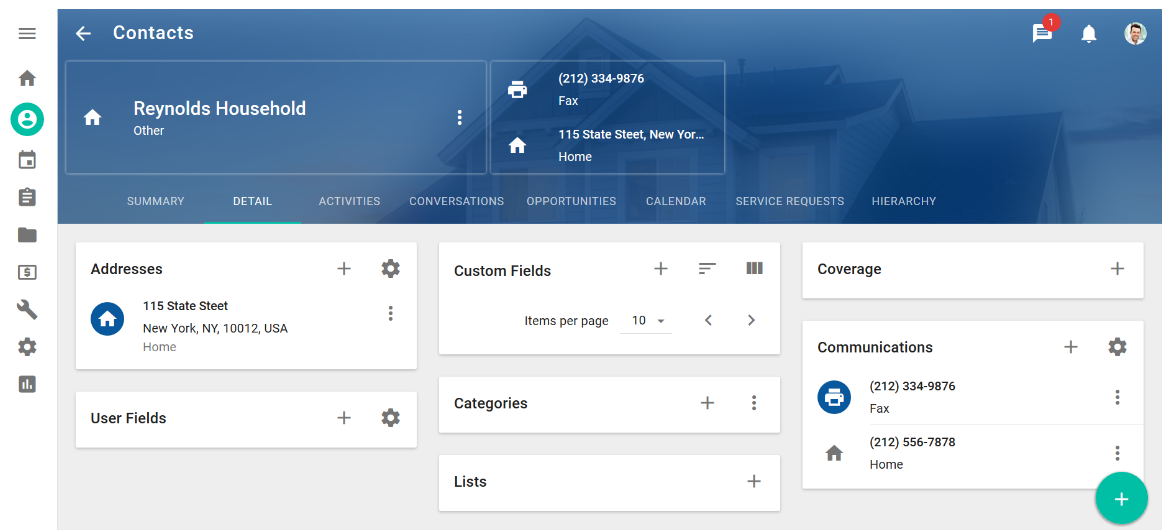
Managing households

A *household* is an entity that represents a group of contacts who belong to the same family.

You can use the text search field and Households filter to find household records in the data table on the Contacts workspace.



You can add and modify household information on the Contacts workspace.



For more information, see "Households" in the end user documentation.

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Ability to suppress conflict warning messages

For a cleaner Process Management form upgrade experience, the visibility of conflict warning messages on the NexJ CRM user interface can be configured in the `Development.properties` file.

For more information about bypassing conflict warning messages after a form upgrade, see Developing Process Management forms.

Creating advisory and hold notes for entities

NexJ provides forms for creating advisory and hold notes for entities. These regulatory notes are used to document the investment advice you provide to clients, and are required to confirm the suitability of recommendations made to a client. When you are creating documents for entities in the **Activities** tab on the Contacts workspace, you can select the **Advisory Note** or **Hold Note** document type to open the required form.

For more information about creating advisory and hold notes, see "Activities" in the end user documentation.

Creating client KYC information

NexJ provides a form for collecting Know Your Client (KYC) information for a client. In the banner on the detail page for a selected contact, click the **More Actions** button ⋮ and select **Client KYC** to open the form.

For more information about creating a client KYC, see "Contacts, companies, households, and users" in the end user documentation.

Reporting enhancements

This release includes the following enhancements to the reporting functionality.

Scheduling reports

The functionality for scheduling reports has been moved from the Report Builder to the Schedule section in the **About** tab in the Report Viewer. This means that you can schedule any report that is visible to you even when you did not create the report.

For more information about scheduling reports, see "Ad hoc reports" in the end user documentation.

Creating dashboards based on templates

NexJ provides dashboard templates that you can clone to create your own dashboards. The following new tabs have been added to the NexJ CRM Reports workspace:

- My Dashboards - displays the dashboards you have created

- All Dashboards - displays all the dashboards that you can view, including those shared with other users

For more information about using dashboard templates, see "Ad hoc reports" in the end user documentation.

Report objects are linked to details data

In NexJ CRM, objects that are associated with reports in the **Live Detail** tab in the Report Builder or Report Viewer, and that have detail data (for example, people, companies, service requests, deals (and other opportunities)), now automatically link to their detail pages. For example, when you are creating a deals report in the Report Builder, and you have added the **Owner** field, you can click on an owner's name in the **Live Detail** tab to open the owner's detail page on the Contacts workspace.

For more information about creating and viewing reports, see "Ad hoc reports" in the end user documentation.

Sharing report exports by email

You can export a report and email the report to a distribution list by clicking the **Export Report** button, selecting **Share By Email**, and providing email addresses for recipients.

For more information about sharing reports, see "Ad hoc reports" in the end user documentation.

Exporting ad hoc report visualizations

You can now export the visualization associated with an ad hoc report in PNG format. This is an extension of the pre-existing export functionality, which allows you to export the summary, detail, and JSON definition of an ad hoc report.

To export the visualization, click the **Export Report** button for the report and select **Export Chart**.

For information about setting up the ad hoc reports export, see Setting up the ad hoc reports export for summaries and visualizations.

For more information about exporting reports, see "Ad hoc reports" in the end user documentation.

NexJ Admin Console enhancements

This release includes enhancements to NexJ Admin Console functionality, including a new **Reset folder state (all links)** button, and provides the ability to write Microsoft Exchange synchronization events to application logs.

Batch resetting folders states for Exchange users

NexJ provides the ability to batch reset folder states for Exchange users.

Exchange Server items, such as tasks and meetings associated with a user's account, can be subject to various policy changes. When policy changes are applied, you can reset multiple folder states for Exchange Server, which can minimize synchronization overhead associated with a broad Exchange policy change.

For more information about resetting folder states, see Resetting folder states for Exchange Server policy changes.

Including Exchange events in application server logs

You can now configure Exchange synchronization process logs to be included in your application logs.

To enable this feature, turn on the Exchange App Logs global application setting. For more information, see Enabling application features.

For information about how to locate Exchange synchronization entries in the application logs, see Finding exchange synchronization logs.

Application development enhancements

This release includes enhancements to application development functionality.

Using Content Assist for Scheme

Content Assist, which is the contextual list of available functions and variables which can be displayed for Scheme scripts in NexJ Studio, has been improved. For more information about Content Assist, see Using Scheme.

New features delivered in 9.2.3

The following features and enhancements were included as part of 9.2.3.0.

Application development enhancements

You can now launch a NexJ CRM dialog from a third-party application, using the new openNexJPopup JavaScript function. For example, while a user is working in a different application, you can enable them to access NexJ CRM functionality such as task creation or report generation.

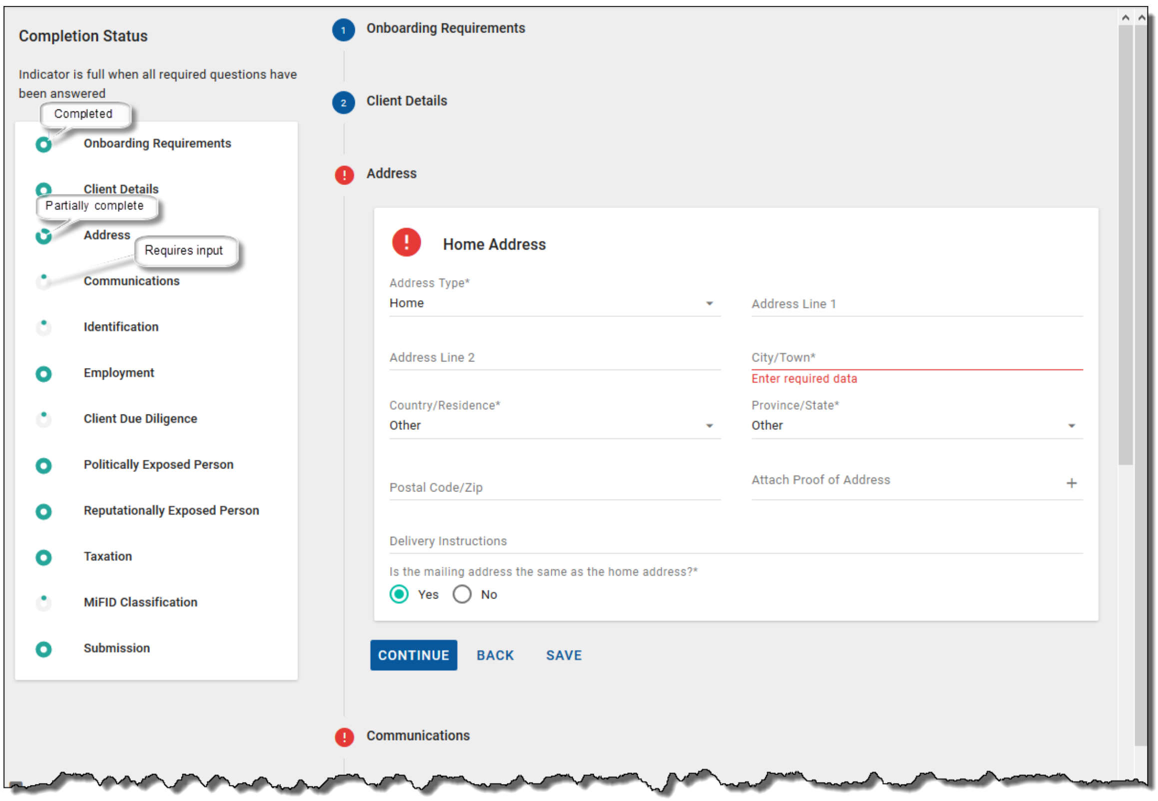
For more information, see Launching NexJ CRM dialogs from third-party applications.

New features delivered in 9.2.2

The following features and enhancements were included as part of 9.2.2.0.

Process Management form enhancements

When you are filling out Process Management forms, you can track your completion of required questions using a progress list in the Completion Status for the form. The progress indicator for a form section displays as full when you have completed all required questions for that section.



For information about using the progress list, see "Filling out Process Management forms" in the end user documentation. For information about enabling the progress list for users, see Developing PM forms in the technical documentation and "Managing Process Management forms" in the application administration documentation.

Reporting enhancements

NexJ CRM's ad hoc reporting capabilities are now powered by NexJ Reporting. Support for JasperReports ad hoc reports has been removed from 9.1.0 onwards.

NexJ Reporting provides runtime-configurable reporting capabilities. Users can dynamically define reports by selecting relevant data across CRM subject areas and summarizing the selected data into tabular or graphical representations. They can also organize the reports into easy-to-read dashboards. For more information, see "Ad hoc reports" in the end user documentation.

Administrators can assign privileges to define the level of access individual users have to the ad hoc reporting functionality. For more information, see NexJ CRM privileges.

Developers can seed in public reports, customize report template names and descriptions, and create and extend subject areas for ad hoc reports. For more information, see Ad hoc reports development.

New features delivered in 9.2.0

The following features and enhancements were included as part of 9.2.0.0.

NexJ CRM user experience enhancements

NexJ CRM 9.2.0.0 features a user interface (UI) based on a responsive platform that implements Google Material Design specifications.

The UI provides the following benefits:

- Improved productivity through a new user experience design
- Responsive design that works for multiple screen sizes
- Provides an easy-to-use UI that increases user adoption and reduces the learning curve
- Uses modern technology that works with universal web patterns and browser technologies
- Delivers functional and visual consistency
- Provides a modern application user experience based on Google Material Design guidelines, which delivers intuitive navigation that helps you to find what you need where you expect it

For this first release of this new UI, the following function points are available:

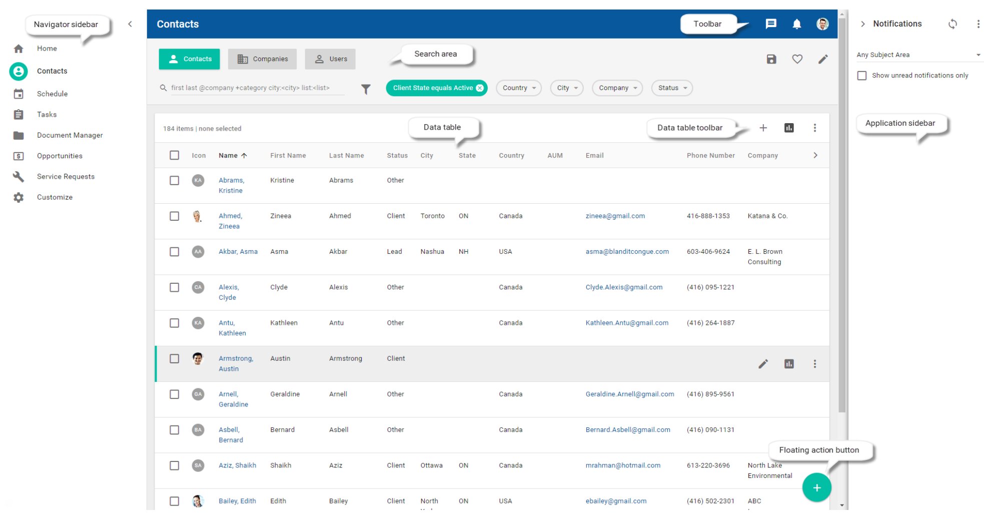
- Contacts and companies record creation and editing
- Activities, tasks, and schedule management
- Notifications that alert you to information changes in NexJ CRM
- Conversations for exchanging messages between users
- Document Manager for storing and organizing documents
- Opportunities for tracking specific products or services that create further upselling opportunities
- Email-to-Service-Request for automatic creation of service requests based on incoming customer emails
- Service request creation and editing

- Customize workspace for business administrators to configure categories, custom fields, coverage groups, and so on
- Predefined reports that display information from specific workspaces
- Business processes for change approvals

> Functionality that has not been migrated to the new UI remains available in the classic UI, which was used in the 8.X releases.

Floating action button, sidebars, cards, and data tables

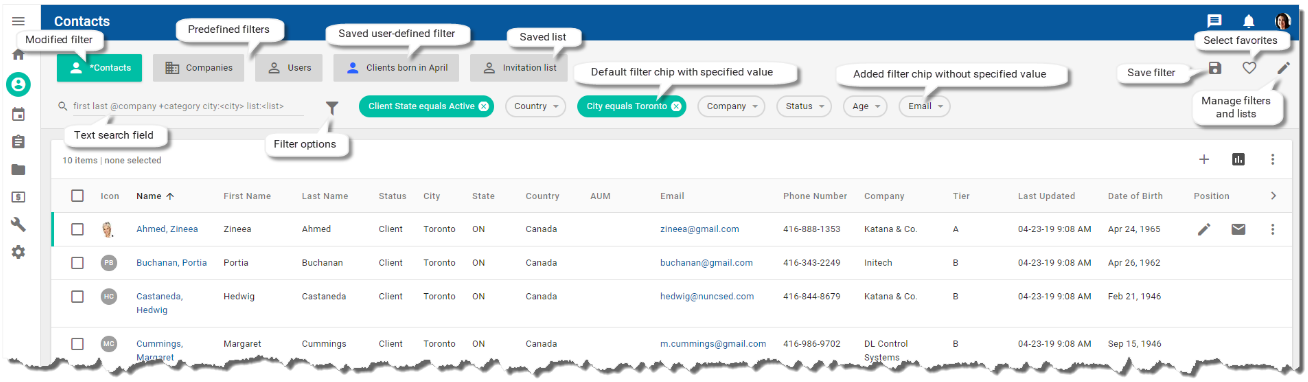
The 9.2.0.0 UI includes a floating action button, sidebars, cards, and data tables. The floating action button enables you to quickly access the most common functionality for a workspace or the application.



For more information, see "Navigating the NexJ CRM user interface" in the end user documentation.

Searching and filtering

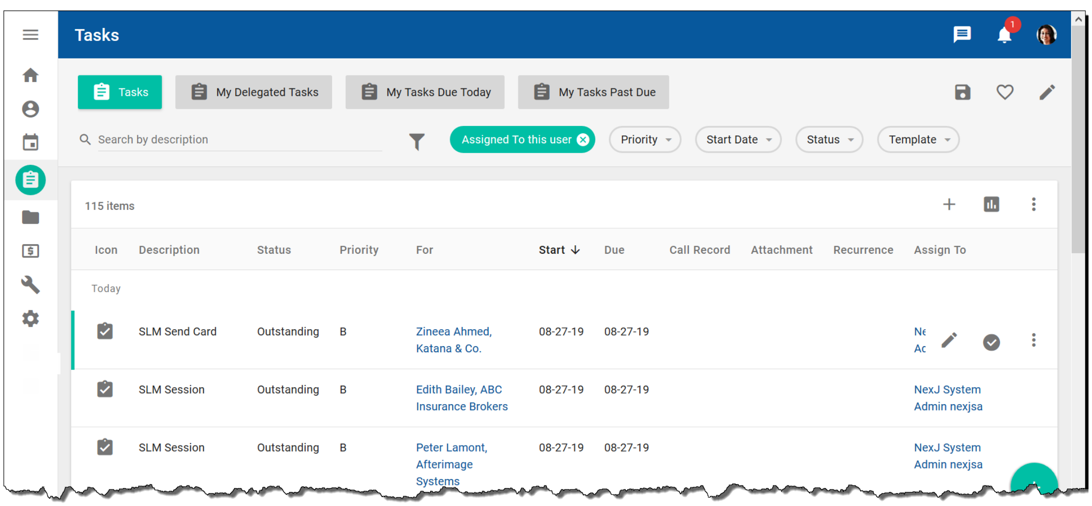
This release includes enhancements to the searching and filtering functionality. You can use predefined filters to find records quickly that match the filter criteria based on the workspace subject area. You can create and save user-defined filters by combining predefined filters with your own additional filtering criteria using filter chips. When it is shown, you can use the text search field to enter search criteria based on the subject area and the search functionality of a workspace. You can also create personalized saved lists of contacts, companies, or users that you frequently need to access as a group.



For more information, see "Searching and filtering in NexJ CRM" in the end user documentation.

New Tasks workspace

This release provides a new workspace for tasks. This new workspace enables you to leverage search and filter capabilities, display more tasks information in a larger working space, and manage tasks.



For more information, see "Tasks" in the end user documentation.

Push notification information enhancements

The About NexJ CRM dialog provides information about the push connection used for NexJ CRM. As of the 9.2.0.0 release, the **Push State** field can display more connection states compared to the classic version of NexJ CRM (8.X releases). The following states are available for display:

- Starting

- Connecting
- Stopped
- Polling
- Running
- Retrying

The classic version has Starting, Running, and Stopped states.

A push retry timeout (in milliseconds) is also displayed in 9.2.0.0.

NexJ Admin Console enhancements

To create a consistent configuration experience, NexJ CRM has deprecated some user options and replaced them with privileges.

For more information, see Enabling user options .

NexJ System Admin Console enhancements

As of 9.2.0.0, the System page in NexJ System Admin Console enables you to manage session timeout settings, global process concurrency settings, recurring schedule items, message queues, and the frequency for generating new periods, and simplifies monitoring the health of your application server cluster. For more information, see Configuring global system settings and Reserving servers for specific functions.

Application development enhancements

This release includes enhancements to application development functionality, including a Scheme code linter.

Data compression enabled out-of-the-box

To improve performance, and as of the 9.2.0.0 release, HTTP traffic is compressed to minimize network bandwidth.

For more information, see Creating a new environment file.

NexJ Studio project linter for Scheme code

This release includes a linter to enforce coding standards in Scheme scripts and XML source elements. Linting rules are provided with this engine and may be expanded by implementing new rules in a NexJ Studio project. The rules may be disabled entirely, by resource type, or with a comment indicating that the lint violation should be ignored.

For more information about the NexJ linter mixin, see Linting Scheme code in NexJ Studio projects[4].

NexJ Studio support for JavaScript

Instead of using Scheme as the default scripting language in NexJ Studio, you can now use JavaScript for the following:

- Use JavaScript as the scripting language when testing your code in the Minimal Console.
- Create JavaScript Libraries in addition to Scheme Libraries in the Resources layer.
- Define individual unit tests as well as the unit test initializer in JavaScript.
- Set the project language as JavaScript. This affects the following fields:
    - For a class attribute, **Value**, **Validation**, and **Initializer**.
    - For an action in a class event, **Condition** and **Script**.
- You can also individually define class attributes and actions in class events as supporting JavaScript.

For more information about using JavaScript in NexJ Studio, see Using JavaScript and Using the Minimal Console.

Ability to enable and disable concurrent metadata loading

To minimize potential server start-up issues, concurrent metadata loading is now disabled by default. If necessary, you can enable it by setting the `concurrentLoadingEnabled` property in the environment file to `true`.

Improved interface development functionality

Model Description Language (MODL) has been designed to simplify interface development and make it more efficient, including reducing the requirement for scripting.

The Model Server renderer, which translates MODL elements, attributes, and scripts into an application running on a user's browser, has been enhanced to support the rendering of the new or improved user interface elements described in "NexJ CRM user experience enhancements" above.

4 https://confluence.nexj.com/display/PUBDEV9/.Code+linting+v9.2

The previous interface development functionality continues to be supported. You can access this functionality in the Classic Presentation layer in NexJ Studio.

Simplified specification

Prior to this release, the screen and form elements were used in various combinations to provide support for portlets, popup dialogs, pickers, filtering, and querying patterns. The new MODL elements explicitly call out these patterns to simplify the design. The application now consists of workspaces, which include the optional navigator portlet and the page portlet. Each portlet is then composed of reusable layouts and controls. In addition, specific new elements have been added for pickers, dialogs, filters, and banners.

Efficient development

- Using MODL UI controls reduces scripting requirements. For example, you can now define simple pickers or filters without any scripting at all.
- MODL UI controls are designed with responsive design support. This means that a single design can be appropriately rendered on many different sizes of screens without the need for additional coding.

Performance improvements

- Simplified markup and scripting improve client load and performance.
- Reduced state requirements improve performance and increase flexibility in server clustering and load balancing configurations.

UI automated testing

You can now record and play back UI testing scripts using Selenium WebDriver[5].

Monitor application with Grafana dashboards

You can monitor the health of your application server(s) over a defined period of time using Grafana dashboards. This release includes dashboard templates, available for download from the NexJ System Admin console, that work with Grafana when statistics are persisted to InfluxDB.

For more information, see Monitoring NexJ Model Server with Grafana dashboards .

5 https://www.seleniumhq.org/projects/webdriver/

Known issues and workarounds

The following are a list of the most critical known issues in the current release of NexJ CRM and problem workarounds, where possible.

Process Management

This section describes known issues that pertain to NexJ Process Management.

CPM-554

When you configure a Process Management form to have `$onSubmit` with a `get` array, and attempt to compile, exceptions are thrown, and the compiled expression is incorrect because the array functions are not supported by the `$onSubmit` function.

CPM-770

M1 and MM pickers used in process management forms have a 20-character length limit. This differs from the behavior of these controls when used in the main CRM application.

Microsoft Exchange Server

This section describes known issues that pertain to Microsoft Exchange Server and synchronization.

AFL-2773

When you create a meeting in Microsoft Outlook, the Schedule workspace does not display the meeting until you manually refresh the browser.

AFL-4170

If your deployment of NexJ CRM uses the Hierarchical Access Model to manage its access control, and a user set up with Microsoft Exchange creates and delegates a task without putting any contact information in the **For** field, then the user will not be able to see that task after its creation.

Workaround:
Ensure that users set up with Microsoft Exchange always populate the For field, when creating delegated tasks.

ECRM-28463

NexJ Add-In for Microsoft Office does not support the use of the single quote character (') in emails as expected but NexJ CRM does support using the single quote character. Use of internationalized email addresses (for example, "hei@やる.ca") is not supported by NexJ Add-In or NexJ CRM.

ECRM-29227

When Microsoft Exchange synchronization is configured with NexJ CRM, and you add attachments in Microsoft Outlook that exceed the size limit of 2 MB, the attachments do not synchronize with NexJ CRM.

ECRM-30336

Some tasks created in Microsoft Outlook with an email attachment may be synchronized inbound with the email attachment omitted from NexJ CRM.

ECRM-30998

When meeting invites are enabled, a change to an external participant on a schedule item does not trigger an email notification.

Mobile

This section describes known issues that pertain to the NexJ CRM mobile application.

AFL-4749

If you are using an iPhone and portrait mode, after NexJ CRM is loaded and you rotate the phone to horizontal mode, and rotate back to portrait mode, white spaces appear and remain at the bottom of the page.

AFL-4805

If you are using Safari on iOS, and you view a contact in portrait mode then the menu items in the contact's banner summary do not appear.

AFL-4811

When you open NexJ CRM as an app on any iOS mobile device (iPhone or IPad), and open another app (for example, an email app), the NexJ CRM app closes and you must log back in.

AFL-4987

When you are using a mobile device to navigate the Schedule workspace, and you select multiple users with only one calendar being displayed at a time, and then deselect the user whose calendar is being displayed, an inconsistent view displays.

AFL-4991

If you log in to NexJ CRM using an iPhone, navigate to any data table view without right-click options, the **More Actions** menu button ⋮ is displayed.

AFL-5110

If you are using Safari on iOS, and you attempt to reload a dialog while there are unsaved changes, you do not receive a prompt to confirm whether you would like to proceed.

AFL-5298

When viewing household information for a contact, the banner information may render with a line across the information.

AFL-5514

If you open a menu that spans the height of the entire screen, the space provided above the menu, which you can use to close it, may be small and difficult to recognize. Tapping this space, however, still closes the menu.

Admin

This section describes known issues that pertain to NexJ Admin Console, NexJ System Admin Console, and the Customize workspace in NexJ CRM.

AFL-3945

The view and edit security attributes, which only apply to the group security model, erroneously display in the audit trail for activities when using the hierarchical access model.

AFL-3994

When creating or editing a filter from the **Filters and Lists** tab on the Customize workspace, a subject area named **Class Attribute Log** is available for selection. However, filters associated with this subject area do not display anywhere in the application.

AFL-4174

If you add attachments to an activity template, when an associated activity is created in NexJ CRM, the **Attachments** field in the New Task dialog shows multiple instances of each attachment.

AFL-4191

If you do not enter a value or enter an invalid value in a required field in the Add Opportunity Template or Edit Opportunity Template dialog, the error that displays when you try to save the template does not clearly indicate the tab and the field that requires attention.

AFL-4206

After editing a task template to remove any "assign to" users, if you click the **Add Task** floating action button and select the template that you edited, the **Assign to** field does not update to reflect the change that you made.

AFL-7672

When an administrator creates a new custom field on the Customize workspace, an issue prevents the administrator from removing entity types.

Workaround:
Create the custom field with all entity types, and then remove the additional entity types through the custom field edit dialog.

ECRM-29289

When you use the classic user interface to create a new distribution rule for leads on the Customize workspace in the **Lead Management** tab, and you set the owner by selecting a user in the **Assign To** field, the selected **Assign To** value is not displayed in the rule's profile as expected.

ECRM-31063

When OAuth is configured for NexJ CRM, and you attempt to perform an operation in NexJ Admin Console after the client OAuth session has expired, a page error is generated.

Reporting and analytics known issues

This section describes known issues that pertain to ad hoc report and predefined report functionality in NexJ CRM.

Predefined reporting

AFL-6012

There is an issue where 30-minute schedule items set to start midway through an hour show in the Schedule Day Report as spanning a one-hour interval ending at the scheduled end time.

AFL-7134

When you have created a Schedule Month Report on the Schedule workspace, and opened the saved report, the month caption in the title for the report is incorrect. This issue is specific to the Indian Standard Time (IST) time zone.

Ad hoc reporting

CDM-3403

After you trigger a report to be executed, the **Update Report** button is greyed out and becomes unavailable in the user interface. However, It is currently possible to update an already executing report if you navigate back to the report library and open the report again.

CDM-4073

The presence of bireport privileges to the project-level security files is ignored when you validate or publish the model, resulting in an Unknown Privilege error.

Workaround:
Seed the privileges in the model using a SysUpgrade.

CDM-4175

If you create a chart that uses two Y-axes, the visualization of the second axis may incorrectly display the data, legend, and captions.

Workaround:
Updating the report repeatedly eventually causes the chart to display as expected. However, later refreshes may cause the issue to reappear.

CDM-4318

In a stand-alone reporting configuration, if a user updates a newly created report, they will not receive a notification when the update completes.

CDM-4320

If a user has a public report open at the same time that an administrator is making changes to its definition, those changes may not be recognized when the user clicks **Update Report**.

Workaround:
To see the changes made to the report, the user must refresh their page.

CDM-4371

Sample data for reports and dashboards is seeded erroneously for disabled subject areas.

CDM-4438

In a Reporting environment configured with replicated CRM database, and when a report is updated or exported, no notifications are displayed. However, the report is still updated or the export file downloaded successfully.

CDM-4474

In a NexJ CRM environment with ad hoc reporting enabled, if you have built a dashboard that includes any of the pre-configured report templates, and subsequently updated your NexJ Reporting configuration to be deployed on a dedicated Reporting server, the previously added report templates will need to be re-added to the dashboard. Manually configured reports are not affected by this defect.

CDM-4477

Users are unable to create a report containing filters on the Reports workspace, and then modify the report name or the description an unlimited number of times without encountering an "Invalid collection item in attribute "filters" of class "bireport:Report" (expected TransferObject)" error.

Workaround:
Refresh the Report Builder page and then make your changes.

CDM-4478

When you build an ad-hoc report that contains currency values, and then select a different currency in the User Preferences dialog in NexJ CRM, the change is not reflected in the report output. This bug is isolated to environments with a dedicated Reporting server.

Workaround:
You must re-create the reports.

CDM-4499

Users who do not have the rpt:DashboardManage privilege should not be able to build, edit, or export new dashboards. Currently, they are able to create and export public dashboards. For private dashboards, they can initiate dashboard building but receive the following error: Error - Access denied to an instance of class "bireport:Dashboard".

CDM-4500

When you log into NexJ Admin Console, create a new privilege group with the rpt:gReportPublicManage privilege (for example, PR1), create a new user, add the Manage Contacts and the PR1 privilege groups to the user, log into NexJ CRM as the newly created user, navigate to the Reports workspace, click the **Add Report** button to add a new report, and select any template (for example, Company List), the user is only able to create public reports for new blank reports. Reports based on existing templates can only be created as private.

CDM-4517

If you log into NexJ CRM as a user with reporting privileges, navigate to the Reports workspace, click the **Select columns** button, and deselect all data table columns, all data table buttons and columns disappear from the Reports workspace, and you can't add a new report or add back deselected columns.

CDM-4867

You cannot successfully search for attributes that include brackets in their captions when adding fields to ad hoc reports.

CDM-5007

When a report that includes more associated collections than is allowed by the "Max CSV collections" setting is exported to a CSV file, the "extra" collections are saved as headers without data, which could be misleading. The expected behavior is for such columns to not be included in the exported file.

CDM-5054

You cannot apply multiple filters fields one by one to a dashboard for ad hoc reporting as adding a new filter field erases the filter field you had previously added.

CDM-5057

Exported charts for reports omit bars for timestamps that should show as zero.

CDM-5114

When multiple values are provided for a text filter in a report (for example, adding multiple text values for the `equals` or `contains` operators), are saved, and then edited again, the latest updated values may not always take effect.

CDM-5176

In rare occasions, filtering on date type attributes in Reporting may return incorrect results. The issue is isolated to date attributes in NexJ CRM (for example, "Expected Close" for Opportunities) and where the time zone difference between the user entering data and the user generating the report is significant.

CDM-5360

When calculations involving a date field (for example, calculating the maximum of Create Time) are added to the **Summary** tab of a report, but no grouping is specified, then the date values are incorrectly formatted as numbers.

CDM-5448

When configuring a calculated field for an ad hoc report and using TEXT() function with a currency field as input, the resulting value is not formatted correctly.

Workaround:
Use another numeric function as a wrapper to the currency value, for example: `TEXT(ROUND('Expected Amount', 2))`

CRM-43

When a Contact report includes fields for a related entity (such as Company or Household) and a user clicks on the navigation link that may be available for such fields (for example, Household > Full Name), the link incorrectly takes the user to the contact's profile. This issue occurs for all entity-based reports.

CRM-195

Unexpected run-time errors that occur during the evaluation of a calculated field formula currently result in the NULL (empty) value displayed for the affected field.

CRM-626

Some associated fields (for example, the "Household" for a Contact) do not appear when the type-ahead is used to add a calculation on the **Summary** tab.

CRM-2166

For some date values, typically at the beginning or end of a calendar year, grouping by weeks could result in incorrect groupings. For example, Friday, January 1, 2027 is incorrectly placed into “Week of January 3, 2027” rather than “Week of December 27, 2026”.

CRM-2760

Adding a filter on a currency field in a dashboard may not work correctly if the report and user currency units do not match. The issue only applies to fields for which currency conversion is enabled.

Desktop

This section describes known issues that pertain to the NexJ CRM desktop application.

AFL-2522, AFL-2757

If you add a schedule item spanning more than a day with an end time of 12 AM and do not select the **All Day** checkbox, the item displays as expected in the Date view, from the start date till the day preceding the end date. However, in the Workweek, Week, and Month views, it displays across the end date as well, ignoring the fact that end time is 12 am on that day, which is, effectively, the end of the previous day.

AFL-2553

You cannot press Enter to commit any instances in NexJ CRM; for example, you cannot press Enter to save a new contact.

AFL-2866

The start and due dates that you enter for recurring tasks may get altered during the process of saving the task.

AFL-2888

When you don't have access to private categories on the Categories card in the **Detail** tab, the **Delete** button should either be hidden or disabled. Instead, the **Delete** button shows as enabled with no function.

AFL-2968

If a user does not have sufficient privileges to log in to NexJ CRM, the resulting error message does not accurately convey the issue. The error message reads: Read access to class portal:Portal denied due to missing privilege "portal:PortalView".

Workaround:
Ensure that the user is included in the Manage Contacts privilege group or the Administrators privilege group.

AFL-3166

When you open the User Preferences dialog, change the **Default Country**, and close the dialog, the user preferences attribute values are not refreshed and your change is not displayed in the user interface.

Workaround:
To implement your change, restart the application.

AFL-3421

If you create a custom field setting its edit security to private, the **Edit** button for the custom field should be enabled for other users, though they should not be able to make any edits. However, the **Edit** button is disabled, preventing users from being able to view the custom field details.

AFL-3444

Both filters and lists are supported on the **Contacts** workspace. Only filters are supported on all other workspaces; the labels on the **Manage filters and lists** menu item and the **Filters and lists** dialog are inaccurate on other workspaces.

AFL-3446

When creating a new opportunity, you must specify a role for all users listed on the Team tab, including the default user. If you receive the "Opportunity Coverage must be specified" error message when creating a new opportunity, go to the Team tab and ensure there is a value in the **Role** field for each user.

AFL-3465

When you create a schedule item with one or more entities in the **For** field or add an entity to the **For** field of an existing schedule item, when you save the change, a hyphen gets appended to the schedule item's description. For example, the description "Meeting" changes to "Meeting -".

AFL-3628

If you upload a document with the Edit security set to private, the **Edit** button for the document is erroneously enabled for other users. Any changes made by the other users, however, are not saved.

AFL-3769

When you scroll through messages in the **Conversations** sidebar, the **Search conversations with** field at the top of the sidebar becomes hidden.

AFL-3782

When you are adding a new user to a contact's Coverage card, and you use the type-ahead functionality and start typing characters in the **User** field, the list of suggested users does not automatically display for selection below the **User** field as expected. Instead, you must remove the text you have entered in the field for the list to display. Also, the type-ahead functionality does not behave as expected in the **Detail** tab for an opportunity, when you are adding a new user to the Team card, or when you are entering user group names in the **Security** tab for a new opportunity.

AFL-4027

If you add a user to a contact's Coverage card in the **Detail** tab and assign it a coverage role (for example, Advisor), add the user again with a different role (for example, Assistant), edit the user with the Assistant role, and attempt to select the original coverage role (for example, Advisor), you will receive duplicate error messages in the Edit dialog.

AFL-4061

If you change the status of a recurring task from competed to outstanding and change the number of repeats, the edits do not reflect in the remaining occurrences.

AFL-4064

Completed tasks in a series of recurring tasks sometimes show incorrect dates for the repeats.

AFL-4105

When you try to print a document created in Microsoft Word 2007 or earlier that has a header with a table containing merged fields, you receive an error.

AFL-4115

On Internet Explorer and Chrome, you may not be able to generate the Tasks Report and the My Delegated Tasks Report if you have a large number of reports (for example, over 3000 reports).

Workaround:
Log in to NexJ CRM using Mozilla Firefox to generate the reports.

AFL-4116

When you add attachments to a document using the Document Manager workspace, save your changes, and re-open the document again, the order of the attachments has changed from the original order. This also happens when you attach documents to a new task on the Tasks workspace.

AFL-4284

After navigating from a contact to the associated company profile and then from the company to another associated contact's profile using the **Hierarchy** tab, when you go to the Contacts data table and click the original contact, the company summary opens instead of the contact summary.

Workaround:
Refresh your browser before clicking the original contact.

AFL-4350

If you have granted delegate permissions to your schedule to other users, schedule items assigned to both yourself and your delegates with no reminder set (reminder time set to "none") may show the default reminder time on your delegates' schedule.

AFL-4574

When negative values are provided for the Expected Amount and Actual Amount filter chips on the Opportunity workspace, the values are displayed in parenthesis and with a negative sign prefix.

AFL-4647

When you generate a PDF that contains a multi-line text field based on a merge token, the multi-line text is printed on a single line and the text is not wrapped as expected.

AFL-4648

If you create a new filter on the Opportunity workspace, add the Weighted Revenue filter chip, set the filter definition operator to "between," pick two values, save the filter, and refresh the browser, an unexpected error displays when the workspace is reloaded.

AFL-4685

When you are using Google Chrome or Mozilla Firefox, you cannot use the Escape keyboard key to close all dialogs in NexJ CRM. Some dialogs require you to select a control first (for example, radio button or checkbox) so that focus is on an active control before you can use the Escape key.

AFL-4717

If you create a household and then attempt to create a contact or company, the **Household** field in the New Contact or New Company dialogs is prepopulated by default with the household you created.

AFL-4787

If you navigate to the Schedule workspace, select the **Month** view option from the **More Actions** menu, click on a date's cell and press the Enter key or the Space key to open the New Schedule Item dialog, the **All Day** checkbox is not selected by default as expected, and it is mandatory.

AFL-4885

The space where the right-side carousel button › would appear in a data table is sometimes highlighted with a border when the last column is in view.

AFL-4912

When you attempt to deselect items in a multiple selection dialog, after having exceeded the selection limit, you are prompted with a selection warning message for the second time.

AFL-4972

If you include symbols (such as & or #) in your filter chips, even if they are valid characters to search for, the filter will not show any results.

AFL-4986

The **More Actions** menu button associated with a tile in a card may not close the menu as expected when clicked and can appear out of alignment.

AFL-5006

When you navigate to the Schedule workspace, click the date to open the calendar, click the year, select a year, and click the date, the scroll bar unexpectedly displays for the calendar.

AFL-5007

When time zones are enabled in NexJ CRM, and you create an all day meeting in a different time zone, the meeting only displays in one day in the existing time zone instead of displaying across two days.

AFL-5075

When you reduce the size of your browser window, the navigation sidebar for NexJ CRM exhibits inconsistent behavior.

AFL-5108

When you have cleared the existing list of filter cards from a navigator (for example, the Contacts workspace), and you add a new favorite filter, it is not immediately displayed. An error is thrown initially when you attempt to set the newly created filter as a favorite.

AFL-5141

When selecting multiple items from a data table, the **More Actions** button will display the top-level of any multi-level menus it contains, even if no actions are available from that section of the menu.

AFL-5159

Only the first 4096 entries of a data table are ever available when viewing data through the user interface. If you attempt to go past these entries, you receive an error.

AFL-5250

When opening a task or schedule item from the notification sidebar, it is occasionally possible that multiple clicks will open additional copies of the Edit dialog over top of each other.

Workaround:
If this happens, close the dialogs and reopen the task or schedule item to make your changes.

AFL-5265

On slower networks, attempts to deselect the all-day option of a meeting may not persist if you save your changes too quickly after making the change.

Workaround:
After clearing the all-day option, wait 3 to 5 seconds before saving your changes to the meeting.

AFL-5333

If you are using the rich text editor in Internet Explorer, you will not receive any warning if you paste text that brings the size of the message over the limit for your system. That is, the pasted text may be truncated without warning. This is normally encountered when pasting text into a message that already contains graphics.

Workaround:
When pasting text into a message containing graphics, be sure to check that all of your content in included.

AFL-5475

When creating a new contact, an empty Dear field automatically populates with the contact's first name when you add an Address to the record.

AFL-5499

When using Internet Explorer, the mouse scroll wheel does not work in the conversation sidebar.

AFL-5623

Running the Contact List report against an empty result set and saving the results as an Excel sheet results in a spreadsheet containing website data from your Companies view instead of a sheet stating that no data exists for the chosen parameters.

AFL-5631

Column sorting within a selection dialog is not available when the selection dialog is invoked directly using Scheme code.

AFL-5632

If you use the between operator on a date-based filter chip and then, after running your search, switch the chip to use the equals operator, your new search will return the correct results, but the chip will continue to display the previous upper-bound value.

Workaround:
Remove the chip from the filter criteria and re-add it.

AFL-5724

If you are using the rich text editor, and you attempt to paste content over selected content, which includes a table, the rich text editor erroneously inserts the content into a table cell instead of replacing all of the selected content or the replacement is aborted by a JavaScript run-time error.

AFL-5726

When you paste content into the rich text editor, incoming newline characters may be doubled.

AFL-5736

When you attempt to submit an update for a record, and if the field being modified by you was updated by another user, then the field is underlined with the misleading caption "Updated as shown."

AFL-6476

If you deselect all columns in a data table, you will not be allowed to re-select the columns because the **Select columns** button is removed.

Workaround:
An administrator user can log in to NexJ Admin Console, select the user who is experiencing this issue, and click **Clear Client State** to reset all user selections to the application defaults.

AFL-6670

When you attempt to create an SLM touch scheduled for a year or more in the future, it may be created incorrectly, appearing as unscheduled and uneditable.

Workaround:
Create the SLM touch for a date closer to the present. Then, edit its due date afterward.

AFL-6979

If a drop-down input field on a dialog has to be re-positioned after reducing the window size, then upon subsequently increasing the window size, the original position is not restored.

AFL-7292

When you have added a new business process template in the Manage Business Processes application, and you select a CPM form in its **Form** tab, the selected form does not display in the **Form** tab, and the **Select CPM Form** button becomes inactive. You must select a different business process, and then reselect the new business process to see the selected form in the **Form** tab.

AFL-7656

Some modified filter cards in selection dialogs do not show the asterisk indicator until they are selected.

AFL-7960

In some cases, start times cannot be specified for schedule reminders in the UI within 1 hour before a daylight saving time change. When start times can be specified within 1 hour before this time change for schedule reminders, they don't always display in the UI.

CRM-74

When attempting to launch the Account Plan picker from the Related tab of an activity dialog, an unexpected error occurs.

CRM-80

The interval shown on the Calendar for an all-day event that spans DST may extend to an additional day.

CRM-434

When there is no icon associated with a communication or address type in the Admin Console, the alignment of the corresponding communication or address is misaligned with other entries in the contact detail view.

CRM-446

When a user deletes a custom filter from their filter list, the item per page count is decreased instead of the total count.

ECRM-28436

When you perform a batch print of a PDF in NexJ CRM, the job completes successfully, and the preview of the PDF appears in the details of the completed job, but an unexpected error message displays in the standard output logs.

ECRM-29748

If specifying a time zone for dates is enabled in NexJ CRM and you use a time zone to create a recurring meeting that spans the Daylight Saving Time boundary, occurrences crossing the boundary can be offset by up to an hour.

ECRM-30062

You cannot use a secured PDF as an attachment in a batch email. If you do attach a secured PDF, the batch email will fail to send.

ECRM-30107

If you are using Chrome 83 to access the Schedule workspace through the Classic user interface, and you open a menu, you can no longer dismiss it by clicking away from the menu items. This issue may also persist in for later versions of Chrome.

Workaround:
To dismiss an open menu without choosing one of the menu items, press the Esc key.

ECRM-30380

Currency conversion does not work when all exchange rates are not received on the same day.

ECRM-30834

When a custom field is being created with only special characters, a reference name cannot be generated.

Technology

This section describes known issues that pertain to the application framework.

AFL-3915

If you upgraded from a previous release to NexJ CRM 9.2, users may receive a file size limit error when adding notes or uploading documents beyond a certain size.

Workaround:
Increase the Maximum HTTP Request Size environment file property as needed, for example, by 30%, to allow for equivalent uploads in NexJ CRM 9.2.

AFL-4506

Cross-domain push connections are not supported in the Mozilla Firefox browser.

AFL-4731

When you create or edit an activity, and right-click on the **For**, **Assign To**, or **Add Attachment** fields, the browser native context menu does not display.

AFL-4818

Notifications manually triggered through the business model do not always clear and can be fired cumulatively.

AFL-5211

If you are using an Apple iPad with Apple iOS 13, and you open the New Contact dialog to add a contact, and in the **Date of Birth** field, tap the calendar icon to open the calendar, and navigate between months, or select a year or date, the keyboard erroneously opens after each action.

AFL-5490

When the BatchViewObjectBatchJob runs and there are no records to process, its process status reports a false status of Failed.

CDM-4138

If you are using Studio to build and test reporting functionality, and you update the reporting host URL from a localhost address to a fully-qualified HTTP url, then reseeding the environment may not correctly update your databases.

Workaround: Continue to use a localhost address during your development cycle.

CRM-2485

During JVM crashes or OOM situations, a heap dump is not generated if the default location does not have write permissions or has insufficient storage space.

Workaround:

Add the following JVM argument when starting the `modeld` and `pushrd` scripts: `"-XX:HeapDumpPath=<Heap dump path>"`.

ECRM-29324

If you create an augment from a given class, and then apply a facet from that class to the augment, the facet may not always be recognized. If this happens you will receive an unrecognized facet error when you try to run the model.

ECRM-29650

On first server load of a Classic portlet, and if it uses POST data, the context parameters will be lost due to the time zone detection refresh.

Workaround:
Use GET on the first load of Classic portlets where context is required, or put the values into the URL of the POST.

ECRM-29964

The JVM property "com.ibm.jsse2.overrideDefaultTLS" must be set to TRUE in order for the inform:ArticleSearch HTTPConnection channel to work in a Websphere-based environment.

More information can be found here: https://www.ibm.com/support/knowledgecenter/SSYKE2_8.0.0/com.ibm.java.security.component.80.doc/security-component/jsse2Docs/matchsslcontext_tls.html#matchsslcontext_tls

ECRM-30167

The FileCleanupBatchJob runs daily, deleting File Persisted objects. However, in a clustered environment, it only deletes entries on the currently active node.

ECRM-31107

Documentation from message definitions may not be exported to corresponding Avro schemas generated using messages.

Workaround:
To trigger the documentation to be generated in your messages, set `meta.documentation="true"` in your environment file, which allows the documentation to be picked up by the schema generation.

ECRM-31502

When the **Prioritize Folder Mixins** option is selected in NexJ Studio, the JARs are repeatedly retrieved, and will override the folder mixin when the server is launched.

Workaround:
Preferably, and while the preference is set, skip retrieving the JAR or if that will introduce new bugs, then still prioritize the folder mixin even if both a JAR and a folder can match the requirements while the preference is set.

ECRM-31687

When you have unchecked the **Prioritize Folder Mixins** option in the NexJ Studio Launch Setting preferences, the open folders are still being used locally.

Upgrade notes

Schema changes for 25.02

Schema-level changes

New tables

No new tables have been created.

Renamed tables

No tables have been renamed.

Dropped and recreated tables

No tables need to be dropped and recreated.

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJProcess					Process.OK2			
NJLatestActivityAct							LatestActivityAct.AK_StrtTm	

Environment file changes for 25.02

No new properties were added to the environment file.

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added to the environment file.

Schema changes for 24.11

Schema-level changes

New tables

- NJLatestActivityAct

Renamed tables

No tables have been renamed.

Dropped and recreated tables

No tables need to be dropped and recreated.

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJEntity	customEntityStatusCode				Entity.OK_Custom			

Environment file changes for 24.11

The following properties have been added to the environment file:

- crm.act.latestActivityPastDays
  - To disable the Latest Activities feature, set the value to 0 (default).
  - When set to a value other than 0, enables the Latest Activities feature and specifies how many days in the past should be displayed. The recommended value is 30 days.
  - This feature is currently only supported in Cloud deployments.

Data source connections

- dm:StagingImportDatabase
  - Supports the optional Data Migration feature

Channel connections

- dm:DMFileChannel
  - Supports the optional Data Migration feature. Used to specify the location where the CSV files used for data migration are stored.
- dm:DMReportChannel
  - Supports the optional Data Migration feature. Used to specify the location where the reports regarding Data Migration results are stored.

Mixins

The following mixin has been added for the optional Data Migration feature:

- nexj:meta:dm

- The version required for CRM 24.11 is nexj-meta-dm-0.0.1.0-10-3c94615d.jar

Schema changes for 24.08

Schema-level changes

New tables

No new tables have been created.

Renamed tables

No tables have been renamed.

Dropped and recreated tables

No tables need to be dropped and recreated.

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJCustomFieldTYpe	isAnnual							
NJActivityPlanStep	stepScheduleDuration							

Environment file changes for 24.08

New properties have been added:

- organizationTimeZone - This property is used by the NexJ Schedule Synchronization feature.
- supportEmail - This property is used to specify the email address that should be used on the About NexJ CRM dialog when users click the **Email Support** button.

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added.

Additional upgrade notes for 24.08

You must configure the following Tomcat connector properties when upgrading your application to 24.08. If these changes are not completed, you may experience errors related to passwords and security.

1. In the environment file, remove the `secretRequired` property.
2. In the environment file, add the `ajp.connector.secret` property and set the value to the strong password you want to use.
3. In the environment file, ensure that the `ajp.connector.address` property exists and that the value is set to `"0.0.0.0"`.
4. In the the mod_jk configuration file, for each existing node, add the `worker.<name>.secret` property and set the value to the strong password specified in the `ajp.connector.secret` property in the environment file.
5. For deployments using Windows authentication: In the environment file, set the `ajp.connector.tomcatAuthentication` property to `false`.

Schema changes for 24.05

Schema-level changes

New tables

- NJUSERSYNC

Renamed tables

No tables have been renamed.

Dropped and recreated tables

- NJUser

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJEntity					Entity.OK_Deceased			
NJEntity					Entity.OK_CntWksp			
NJEntityXAudit					EntityXAudit.OK_EditTime			

NJActX Audit							ActXAudit .OK_EditT ime	

Environment file changes for 24.05

New properties have been added for enhanced Keycloak support:

- keycloak.adminPassword
- keycloak.adminUser
- keycloak.defaultNewPassword

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added.

Schema changes for 24.02

Schema-level changes

New tables

No new tables have been created.

Renamed tables

No tables have been renamed.

Dropped and recreated tables

No tables need to be dropped and recreated.

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJEntity					Entity.OK_HousewLock			Entity.FK_House
NJProcess					Process.OK_name			

Environment file changes for 24.02

No environment file changes were made in the release.

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added.

Schema changes for 23.11

Schema-level changes

New tables

No new tables have been created.

Renamed tables

No tables have been renamed.

Dropped and recreated tables

No tables need to be dropped and recreated.

Removed tables

No tables were removed.

Table-level changes

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJUserGroup	system							
NJUserGroup	customized							

Environment file changes for 23.11

- doNotContactEnabled (This property must always be set to `false`. If it does not exist in your environment file, it must be added to it and then set to `false`.)

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added.

Schema changes for 23.08

Schema-level changes

New tables

No new tables have been created.

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

There are no tables affected by DML Upgrade SQL scripts.

Table-level changes:

There are no table-level changes.

Environment file changes for 23.08

The following flags have been added to the environment file for this release.

- doNotContactEnabled
  - This property must always be set to `false`.

Data source connections

No changes to the data sources were made in the release.

Channel connections

No channel connection changes were made in the release.

Mixins

No new mixins were added.

Schema changes for 23.05

Schema-level changes

New tables

- NJLeadEntityStatus

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- RPTReportSettings

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJLeadEntityStatus							LeadEntityStatus.FK_Entity	
NJLeadEntityStatus							LeadEntityStatus.FK_Lead	
RPTReportSettings	showAllAssociationResults							
RPTReportSettings	csvIncludeCurrencySymbol							
RPTFilter	unit							

Environment file changes for 23.05

No environment file changes were made in the release.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 23.02

Schema-level changes

New tables

- NJIBM_IAMToken

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- OQObjectQueue

Table-level changes:

There are no table-level changes.

Environment file changes for 23.02

The following flags have been added to the environment file for this release.

- biSyncEnabled
- attachment.storage.mode
    - Valid values are "FPA", "DAV" and "S3".

    - If this property is not set in a properties file, the default storage for attachment is the database
- ibm.cloud.storage.apiBucketName
- ibm.cloud.storage.apiEndPoint
- ibm.cloud.storage.apiKey

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

- ibm:IAMTokenChannel

Mixins:

No new mixins were added.

Schema changes for 22.11

Schema-level changes

New tables

- QueuedProcessSR
- QueuedProcessCP
- RPTFilterXParent

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

There are no tables affected by DML Upgrade SQL scripts.

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
ServiceLevel	system							
ServiceLevel	customized							
TouchType	system							
TouchType	customized							
Interval	system							
Interval	customized							
TierServiceLevel	system							
TierServiceLevel	customized							
SLTouchTypeInt	system							
SLTouchTypeInt	customized							

TouchTypeInterval	system							
TouchTypeInterval	customized							
RPTFilter	isGroup							
RPTReport	advancedFilterExpression							
NJEntity		rpt_fullName						
NJLead		rpt_fullName						

Environment file changes for 22.11

No environment file changes were made in the release.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 22.09

Schema-level changes

New tables

- NJQueuedProcessSR
- NJQueuedProcessCP

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

There are no tables affected by DML Upgrade SQL scripts.

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
RPTFilter	logicalOperator							
RPTFilter	ordinal							
RPTFilter	notOperator							

RPTReport	isUnlisted							
RPTReportSettings	currency							
RPTScheduledReport	serializedError							

Environment file changes for 22.09

No environment file changes were made in the release.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 22.06

Schema-level changes

New tables

No new tables were provided.

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

There are no tables affected by DML Upgrade SQL scripts.

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
ImportProcess		name						

Environment file changes for 22.06

No new flags were added to the environment file.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

Added	Removed	Updated minimum version
		nexj:ui:engage (0.14.0)

Schema changes for 22.04

Schema-level changes

New tables

- NJIdentification
- RPTReportSettings

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

There are no tables affected by DML Upgrade SQL scripts.

Table-level changes:

There are no table-level changes.

Environment file changes for 22.04

No environment file changes were made in the release.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 22.03

Schema-level changes

New tables

No new tables were provided.

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

- NJCmpgnParticipationStatus

Existing tables affected by DML Upgrade SQL scripts

- NJEnumCode
- NJEnumDisplay
- NJSystemPreference

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
IFInterest		relatedObjectId						

IFSentArticle		relatedObjectId						
RPTScheduledReport	endTime							
CFWFAction	assgnModelId				CPWFAction.FK_AssgnModel			
CPWFAction	assgnModelRoleId				CPWFAction.FK_AssgnModelRole			
CPWTAction	assgnModelId				CPWTAction.FK_AssgnModel			
CPWTAction	assgnModelRoleId				CPWTAction.FK_AssgnModelRole			

Environment file changes for 22.03

The following flags were added to the Environment file:

- crm.document.richTextEnabled (For more information, see "Example environment settings for NexJ CRM deployment" in technical documentation.)
- hideErrorValveReport (For more information, see "Example environment settings for NexJ CRM deployment" in technical documentation.)

- hideErrorValveServerInfo (For more information, see "Example environment settings for NexJ CRM deployment" in technical documentation.)
- multiplier (For more information, see "Example environment settings for NexJ CRM deployment" in technical documentation.)

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 22.01

Schema-level changes

New tables

No new tables were provided.

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

- NJSampleData

Existing tables affected by DML Upgrade SQL scripts

- NJCPWFTemplate

- NJCPWorkflow

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJCPWFTemplate	planningStatus				CPWFTemplate.EK_PlanStatus			
NJCPWFTemplate	progressedStatus				CPWFTemplate.EK_ProgStatus			
NJCPWorkflow	planningStatus				CPWorkflow.EK_PlanStatus			
NJCPWorkflow	progressedStatus				CPWorkflow.EK_ProgStatus			

Environment file changes for 22.01

No environment file changes were made in the release.

Data source connections:

No changes to the data sources were made in the release.

Channel connections:

No channel connection changes were made in the release.

Mixins:

No new mixins were added.

Schema changes for 21.12

Schema-level changes

New tables

- NJSampleData
- NJCPWTAction
- NJCPWTAUser
- NJCPWTATMRole
- NJCPWTActText
- IFLOCKING
- IFTenant
- IFSubscription
- IFFeed
- IFArticle
- IFArticleXContent
- IFTag
- IFArticleTag
- IFPublisher

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJCPWFTemplate
- NJActTemplate
- NJEnumCode

- NJEnumDisplay
- NJEnumType
- NJEnumTypeDisplay
- IFInterest

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJAsgnModelRole					AsgnModelRole.AK1			
NJCPWorkflow	isTemplateUpdated							
NJCampaign								Campaign.FK_Type
NJCampaign								Campaign.FK_Region
NJCampaign				typeCode				
NJCampaign				regionCode				
IFInterest	locking							

IFInterest					Interest.AK			
IFInterest	type							
IFSentArticle	locking							

Environment file changes for 21.12

The following flags were added to the Environment file:

- applicationType (For more information, see "Example environment settings for NexJ CRM deployment" in technical documentation.)
- b2bLeadsEnabled (For more information, see "Setting the lead mode" in technical documentation.)
- advstrm.batch.period (For more information about this flag, and the other two AdvisorStream flags below, see "Example environment settings for NexJ CRM deployment" in technical documentation.)
- advstrm.newsfeed.apikey
- advstrm.newsfeed.url

Data source connections:

Added:

- inform:DB

Removed:

- inform:Inform

Channel connections:

The following connections were added and removed:

Added	Removed
inform:article:search HTTPConnection	inform:ArticleSearch HTTPConnection
inform:article:view HTTPConnection	
inform:advstrm:article HTTPConnection	
inform:gv6:Article HTTPConnection	

Mixins:

The linter mixin is required to be explicitly set in the environment file for applicable clients.

Schema changes for 9.8

Schema-level changes

New tables

- NJCampaignTeamMember
- NJCPWFTemplate
- NJCPWTPStatusLink
- NJCPWTPStatus
- NJCPWFStatusLink
- NJCPWFStatus
- NJCPWorkflow
- NJCPWFAction
- NJCPWFActText
- NJCPWFATMRole
- NJCPWFAUser
- NJEntityXLead
- NJCPPartTimer
- NJCPWFADoc
- NJLoggingConfig

- NJNodeXLogging
- NJNodeLogRemoval

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJImportProcessStage
- NJFilter
- NJActTemplate
- NJUserGroupPrivilegeLink
- NJCampaignTeamMember
- NJCPWTPStatusLink
- NJCPWTPStatus
- NJCPWFTemplate
- NJSystemPreference
- NJUserGroupLink
- NJEntity
- NJUserPerson
- NJUser
- NJPrincipal
- NJLocalUser
- NJUserBase
- NJTypeLocalization
- NJAct
- NJTaskEntity

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJFilter							Filter.OK1	
NJCampaignParticipation	status							
NJCampaignParticipation	statusUpdateTime							
NJCampaign	stageCode							
NJCampaign					Campaign.FK_Stage			
NJActX01							ActX01.FK_Folder	
NJLead	expiryDate							
NJCPWFAction	assignedUserId							
NJCPWFAction					CPWFAction.FK_AssignedUser			

NJEntity	doNotContactFlag							
NJCPWFAction	emailFrom							
NJCPWTPStatus							CPWTPStatus.AK	

Environment file changes for 9.8

The legacyLeadsEnabled flag was added to the environment file. For more information about legacyLeadsEnabled, see the "Updates for version 9.8" section of the "Upgrading to NexJ CRM version 24.05" topic in technical documentation.

Data source connections:

No data source connections were added or removed.

Channel connections:

No channel connections were added or removed.

Mixins:

The sso mixin is required to be explicitly set in the environment file for applicable clients. For more information, see the "Updates for version 9.8" section of the "Upgrading to NexJ CRM version 24.05" topic in technical documentation.

Schema changes for 9.6

Schema-level changes

New tables

No new tables were provided.

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJExchangeServer

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
RPTExecutedReport (for Reporting only)	isScheduled							

RPTReport (for Reporting only)	subjectAreaCaption							
RPTScheduledReport (for Reporting only)	classCode							
RPTExecutedFiles (for Reporting only)	isScheduled							
OpportunityStageTemplate	active							
NJExchangeServer	maxErrorCount							

Environment file changes for 9.6

No new flags were added to the environment file.

Data source connections:

No data source connections were added or removed.

Channel connections:

No channel connections were added or removed.

Mixins:

Added	**Removed**	**Updated minimum version**

		nexj:model:afl
		nexj:model:afl-mda
		nexj:model:portal
		nexj:model:highcharts

Schema changes for 9.4

Schema-level changes

New tables

- NJAccountPlan
- NJAccountPlanXOverview
- NJAccountPlanEntity
- NJAccountPlanOpportunity
- NJAttachmentXAccountPlan
- NJAccountPlanCov
- NJRisk
- NJCompetitor
- IFInterest
- IFVersion

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJUserField
- NJEnumDisplay
- NJEnumCode

Table-level changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJUserField	userFieldTypeId				UserField.FK_Type			
NJAct	accountPlanId				Act.FK_AccountPlan			
NJAct	accountPlanModified							
NJActSeries	accountPlanId				ActSeries.FK_AccountPlan			
NJActSeries	accountPlanModified							

Environment file changes for 9.4

- The following flags were added to the Environment file:
    - rest.configMetadata
    - rest.schemaBase
    - rest.version
    - rest.defaultPageSize

- Removed SQLHook "nexj.core.persistence.sql.ObjectQueueHook" from the Environment file and moved it to ObjectQueueDatabase.datasource

Data source connections:

Added	**Removed**
inform:Inform RelationalDatabaseConnection	

Channel connections:

Added	**Removed**
inform:ArticleSearch HTTPConnection	
rest:OpenAPI HTTPConnection	
rest:REST HTTPConnection	
rest:SelectionOptions HTTPConnection	
inform:RelatedObject HTTPConnection	

Mixins:

Added	**Removed**	**Updated minimum version**
nexj:model:restapi		
nexj:model:inform		
		nexj:model:afl
		nexj:model:afl-mda

		nexj:model:portal

Resolved issues

Version 25.02

CRM-2166

Previously, grouping some date values by week sometimes resulted in incorrect grouping. This issue typically occurred at the beginning or end of a calendar year. For example, Jan 1, 2027 was previously incorrectly placed into “Week of Jan 3, 2027” rather than “Week of December 27, 2026”. This issue has been resolved.

CRM-2747

Previously, the SLM report included data beyond the selected date range, displaying full months instead of limiting results to the specified dates. This issue has been resolved.

CRM-3020

Previously, the reseeding process for reports failed if there were any inactive users with saved report settings. This issue has been resolved and inactive users are now excluded from the seeding process.

CRM-3096

Previously, upgrading an implementation with over 4096 saved filters resulted in an error related to “nexj.core.runtime.DataVolumeException”. This issue has been resolved and the error will no longer occur regardless of the number of saved filters.

Note that similar issues may still occur in other circumstances, for example on startup or when filters are selected. If this occurs, please continue to override the query read limit for the data source in the environment file.

CRM-3218

Previously, Future Steps for activity plans were not displayed in the preview of activity plans and activities included in activity plans. This issue has been resolved and Future Steps are now correctly shown in previews.

CRM-3219

Previously, when attempting to delete a Quick Pick Enum Code that was already associated with multiple entities, an unexpected error occurred. This issue has been resolved and the appropriate error message is now displayed.

CRM-3222

Previously, when adding a new contact to a household, a warning message regarding households that are marked Do Not Contact (DNC) was displayed, even when the household was not marked as DNC. This issue has been resolved, ensuring that the warning only appears if the household is actually flagged as DNC.

CRM-3262

Previously, when creating a new report with the same name as an existing public report, the report failed to save without any error message. This issue has been resolved, ensuring that reports are properly saved, regardless of name duplication.

CRM-3274

Previously, when previewing an Activity Plan that included a read-only step (for example, a Log activity), users encountered some inconsistencies with the **Delete** button behavior. For example, the **Delete** button was visible for read-only steps when it should have been disabled. These issues have been resolved, and the **Delete** button is now displayed or disabled appropriately for all steps, including read-only steps.

CRM-3277

Previously, deleting an Activity Plan that included a read-only step, such as a Log activity, resulted in an “Update access denied” error. This issue has been resolved, allowing Activity Plans to be deleted, even if they contain read-only steps.

CRM-3289

Previously, after a recent upgrade, name attributes were removed from the report field selection search, although they were still available in filters. This issue has been resolved, restoring the ability to search for name attributes when adding fields to reports.

CRM-3377

Fixed an issue where updating the level of system logging using the SysAdmin Console at run-time could result in an unexpected error.

CRM-3410

Previously, adding multiple attachments to a record where at least one of the attachments was an invalid file, sometimes caused the application to become unresponsive. This issue has been resolved.

CRM-3473

Previously, errors occurred when users were filtering search results where the filter field values contained strings that could be used for relative date expressions, for example, the string “day” included in the city search for “Daytona”. This issue has been resolved and filter field values can now safely include keywords such as “Day”, “Week”, “Month”, “Quarter”, “Half”, or “Year”.

CRM-3509

Previously, when searching for an attribute in the Add Filter picker dialog while creating a report, the results included some unrelated associations and irrelevant fields. This issue has been resolved, ensuring that only the relevant fields and associations are displayed, based on the search criteria.

Version 24.11

CRM-377

Previously, if an activity status enumeration (for example, “No Response,” “Restarted”) was deactivated using the Admin Console, this did not remove it from the activity status picker when a user was updating an activity in NexJ CRM. This issue has been resolved, and deactivated statuses no longer appear in the list when adding or updating activity statuses.

Note: Administrators should ensure that no active objects are using a status before deactivating it.

CRM-1531

Previously, when the `currencyConversion` flag was disabled and a currency field referred to the system currency, filters incorrectly used converted values for comparison instead of the system currency values. For example, a filter like `Actual Amount greater than 2` would incorrectly compare a converted value (for example as EUR 3.79) instead of the original system value (for example, CA$1.00). This issue has been resolved, and filters now correctly compare values based on the configured `currencyConversion` setting and system currency.

CRM-1769

Previously, on the Service Level Management workspace, the **Schedule Touch** button did not work when attempting to schedule an activity for custom touch types, such as Strategic Partner Review. This issue has been resolved, and the **Schedule Touch** button now functions as expected for both out-of-the-box and custom touch types.

CRM-2084

Previously, when the user’s currency was changed on the **Localization** in the User Preferences dialog, the value for the Convertible Currency custom fields in reports did not update accordingly, even though the currency itself was correctly updated. This issue has been resolved, and both the currency and the value for Convertible Currency fields in reports now reflect the current user's preferred currency.

CRM-2487

Previously, second Y-axis in a report chart was not always visible while the report was being edited. This issue has been resolved.

CRM-2516

Previously, when adding a "Do Not Contact" (DNC) contact to an Activity Plan, the DNC prefix was shown in the contact picker but not in the "For" field after the contact was selected. Now, the DNC prefix will consistently appear in the "For" field for both Contacts and Households, ensuring better visibility of DNC status when creating or managing Activity Plans.

CRM-2517

Previously, when adding a Schedule Item as a step in an Activity Plan for a "Do Not Contact" (DNC) contact, a warning correctly notified the user that the DNC contact would be removed. However, the contact was still being added back when the assigned step was edited. This issue has been resolved, and DNC contacts are now removed from the Schedule Item as intended.

CRM-2631

Prior to this release, when a calculated field contained a `PERCENTOF()` function applied to a Currency field, using that field as a sort field resulted in incorrect ordering of the report data under certain circumstances. This issue has been resolved.

CRM-2634

Fixed an issue where a call to `getUser()` during a seeding step, typically performed when upgrading to a newer version of CRM, could fail to locate the NexJ System User (`nexjsa`).

CRM-2649

Previously, when currency conversion was enabled, sorting a mixed-currency list of opportunities by Expected Amount would result in incorrect sorting based on raw numeric values rather than converted amounts. This issue has been resolved, and the sorting now correctly accounts for currency conversions.

CRM-2770

Previously, under certain circumstances, users encountered a repeated "Flexmonster: Pivot cannot be drawn" error dialog when opening Ad Hoc reports or dashboards, which required users to click the **OK** button on the dialog multiple times before the report would load. The issue has been resolved.

CRM-2904

Previously, attempting to clone a report with a filter referencing a large number of enumeration values failed, resulting in an “Invalid Filter. The value of Filter must be up to 8192 characters long” error. This issue has been resolved, allowing reports with large enumeration filters to be cloned without encountering this character limit error.

CRM-2908

The nightly sync job to update the global search index was conflicting with other nightly batch jobs. To remove the conflicts, the default value for the JSON configuration attribute `nightlyBatchStartTime` was changed to 10:30 PM in the organization’s time zone (ignoring DST).

CRM-2949

Previously, when a campaign was cancelled or deleted, the “Has Campaign” badge continued to be displayed on a participant’s profile. This issue has been resolved.

CRM-2953

Previously, when changing the report currency in a Deals report that included the `PERCENTOF('Expected Amount', 'Stage')` field, an unexpected “Divide by zero” error would occur. This issue has been resolved, and currency changes are now processed correctly, maintaining the expected 100% value for each stage in the `PERCENTOF` field.

CRM-2976

Previously, when a report title exceeded 64 characters, the generated report identifier would also exceed the limit, causing a validation error. This issue has been resolved by limiting the generated report identifier to 64 characters, based on the beginning characters of the report title.

CRM-2978

Previously, when attempting to clone reports that used enumeration filters, an unexpected “Type Mismatch” error occurred. This issue was caused by incompatible formatting of enumeration filter values in older reports. The issue has been resolved, and reports with enumeration filters can now be cloned successfully.

CRM-3135

When the **Enable sensitive attribute masking** attribute was enabled in the Admin Console under **Statistics > nexj.finance > Administration**, all attribute names and values were incorrectly hidden from the system log output of any RPC calls. This issue has been resolved and enabling this attribute only masks the values of select sensitive attributes for which `logMask` property was set in the CRM model.

Version 24.08.0.1

CRM-2976

Previously, when a report title exceeded 64 characters, the generated report identifier would also exceed the limit, causing a validation error. This issue has been resolved by limiting the generated report identifier to 64 characters, based on the beginning characters of the report title.

Version 24.08

CRM-27

When some navigable entity-type fields (for example, Household) were added to a report as an association of another entity, the navigation link occasionally did not bring the user to the correct CRM screen. This issue has been resolved.

CRM-992

The "Clear queue" functionality on the **Object Queues** tab of the System Admin Console has been modified to function more efficiently with high depth queues.

CRM-1144

Fixed an issue where a NullPointerException could occur while handing the original exception scenario, therefore masking valuable troubleshooting information in the logs.

CRM-1229

Fixed an issue where push notification connection was not properly shut down with the server.

CRM-1289

Updated wording used on the Add Filters for <Association field> dialog to better reflect the fact that additional sub-filters could still be applied.

CRM-1336

Fixed an issue where a cloned dashboard template could lose reference to its reports after the environment was upgraded to a later version.

CRM-1341

Fixed an issue where the value of Probability was formatted as a decimal and not as a percentage on **Summary** tab.

CRM-1482

Fixed an issue where the Date and Time picker dialog was missing the **OK** and **Cancel** buttons when the UI was viewed at 175% scale.

CRM-1514

Previously, when adding a report to the dashboard, using the quick search to look up a report name incorrectly limited the list of reports displayed. This issue has been resolved.

CRM-1538

Fixed an issue where the `hideSpecificFilter="true"` subject area configuration flag applied to association fields did not take effect in dashboards.

CRM-1717

Fixed an issue where referencing a Timestamp attribute in a calculated field formula (for example, Create Time) resulted in a Date format value.

CRM-1747

Previously, when currency conversion was enabled and a currency field was added to a calculated field formula, sorting on the resulting calculated field could result in an incorrect sort order. This issue has been resolved.

CRM-1763

Fixed an issue where a report with a lot of columns could extend beyond the edges of the screen when being added to a dashboard.

CRM-1765

Fixed an issue where disabling navigation for entity-type association fields did not work.

CRM-1782

Previously, when a predefined report was selected from the contact record from the household member list in the Households tab on the Contacts workspace, an error was being displayed in relation to the `householdMembers` attribute. This has been fixed.

CRM-1809

When a calculated field is added as a grouping on a bar chart, the values are now sorted in the correct order on X-axis, as expected.

CRM-1858

Fixed an issue where it was possible to hide all of the chart legend categories causing the chart to enter a bad state.

CRM-1916

Fixed an issue where the `Max field length` system parameter did not get applied to association and calculated fields when the report was exported to CSV.

CRM-1927

Previously, when a privileged report administrator executed a report as another CRM user (using the "Run As" option), navigated to the Settings tab, and then scheduled the report to be shared through email, an error was displayed if the report administrator did not have an email address configured in NexJ CRM. This issue has been resolved.

CRM-1996

Fixed an issue where entering duplicate email address values into the **Email Address Targets** field in the **Settings** tab on the Schedule card resulted in an error.

CRM-2052

Fixed an issue where adding an association filter on a dashboard could cause the dashboard to refresh prematurely.

CRM-2079

When adding the Custom Fields associated collection field to a report, you can now filter on it using the dropdown menu on the field chip. Previously, you could only do this using the Add Filters dialog. This issue has been fixed.

CRM-2088

Fixed an issue where a calculated field containing `COUNT('Custom Fields')` in its formula incorrectly displayed 0 when the contacts included in the report had custom fields added to the profile and when the **Include all related records** field was set to No.

CRM-2097

Fixed an issue where referencing CLOB attributes (for example, Bio) inside a calculated field formula resulted in an unexpected error.

CRM-2133

Fixed an issue where the colors of a chart seen in the UI could be different from those in the exported file in the PNG or PDF format.

CRM-2160

Fixed an issue where the **Display related collection data inline** toggle was not set to the correct value if the report was being viewed by an administrator running the report as another CRM user.

CRM-2203

Previously, when currency conversion was enabled and a calculated field referenced both a Currency field and an Enumeration field in its formula, an unexpected error occurred. This issue has been resolved.

CRM-2254

Fixed an issue where an error during sharing a report by email caused the UI to become unresponsive.

CRM-2331

Fixed an issue where Task notes were occasionally not displayed appropriately in the Activities tab for some households.

CRM-2338

Fixed an issue where adding a period (".") or comma (",") character in the caption of a calculation used in the chart Y-axis caused the visualization to not render.

CRM-2465

Previously, the filter chip used to search for household names was incorrectly labeled “Last Name”. The filter label has been changed to "Name" to more accurately reflect what is being searched

CRM-2467

Previously, if a user was locked by Keycloak and then fields in that user's record were edited using NexJ Admin Console, then the user would be unlocked. This issue has been resolved.

CRM-2472

Fixed an issue where including an Object ID of an association in the report prevented the report from being exported to PDF.

CRM-2478

In a previous release, some PDF exports that did not fit on one page displayed each report column on a separate page. The new "Fit to page" option for Overflow Page Order can now be specified on the **Settings** tab for the report in order to include all report columns on the same page.

CRM-2518, ECRM-29146

The pushrd.sh and pushrd.bat scripts were updated to prevent unnecessary illegal reflective access operation warnings.

CRM-2564

Fixed an issue where a template containing calculated fields could not be used to create new reports.

CRM-2576, AFL-4196

Fixed an issue where updating a leap year date value to another value did not work.

CRM-2580

Fixed an issue where using the `@related:` operator as a part of the Global Search query resulted in a syntax error.

CRM-2613

Fixed an issue where the default sort field (Full Name) was not applied on Contacts reports.

CRM-2630

Fixed an issue where a "(specific)" filter dialog applied on a dashboard did not display the **Value** search field.

CRM-2643

Fixed an issue where an unexpected error was displayed after a scheduled report was exported if one or more of the target email addresses were not valid. All valid email recipients still got their copy of the report.

CRM-2663

Previously, when a user created a schedule item for a targeted activity plan and the schedule item had a non-default duration, an error was displayed. This issue has been resolved.

CRM-2684

Fixed an issue where multiple fields could appear to be in focus after the tab key was used to navigate across a form.

CRM-2699

Previously, Activity Status filters were not showing all possible values. This issue has been resolved.

CRM-2742

Fixed an issue where the **Summary** and **Visualization** tabs could appear empty when a template report is viewed for the first time.

Version 24.05

CRM-405, CDM-5006, CRM-1796

Related opportunities data for household members now exports as expected to CSV files.

CRM-1195

Fixed an issue where a calculated field formula that contained the `COUNT('For')` function incorrectly included entities hidden by the data visibility rules in the result.

CRM-1264

When the **Date of Birth** field is referenced in a calculated field formula, its value could previously be off by a day, depending on the user's time zone. This issue has been resolved.

CRM-1354

When a `DATEADD()` function was used in a calculated field formula and the resulting value crossed the DST change date, an incorrect date value was previously be returned. This issue has been resolved.

CRM-1486

An issue that caused you to receive an unexpected error if you sorted your activity items by due date has been resolved.

CRM-1557

Previously using the `$url` tokens in notification emails under certain circumstances directed the user to the incorrect version of the product. This issue has been fixed.

CRM-1569

On the Service Level Management workspace, the **Period** filter chip now displays periods in the user's time zone and not in UTC.

CRM-1632

Fixed an issue where certain chart types (for example, the Column Line chart) did not have a consistent look when exported to PDF or PNG or when viewed in the UI.

CRM-1682

The “Unsubscribe” link for emails that is included at the bottom of an email for a user when they are notified about a task being assigned to them was not working. This has been fixed.

CRM-1687

Fixed an issue where users in the "Australia/Eucla" time zone were not able to access the NexJ Reporting workspace.

CRM-1751

Previously when the report currency was changed from its default value and a filter on a currency field was added, it was possible for the data in PDF export to not match the UI and the CSV export. This issue has been resolved.

CRM-1771

Fixed an issue where adding a calculated field with `PERCENTOF()` function could result in an error if the grouping field used as the function parameter contained more than 500 distinct values.

CRM-1772

Previously, clicking on a nested collection field on the Configure Filters dialog potentially caused the UI to enter a bad state and required the browser window to be reloaded. This issue has been resolved.

CRM-1921

Previously, when a dashboard was initially configured to include report components from multiple subject areas and then components of only a single subject area were left in the dashboard, trying to add a filter failed with an error. The issue has been resolved.

CRM-1923

Previously, when the **Include all related records** field was set to "No" and a calculated field contained an aggregate function on a related currency collection field, the result of the aggregate function was incorrectly calculated. This issue has been resolved.

CRM-1930

Fixed an issue where data values were not included in the legend of a funnel chart when exported to PDF or PNG.

CRM-1933

The `PERCENTOF()` function previously returned incorrect results when it was applied to a currency field for which currency conversion was enabled and the source values were stored in multiple currency units. This issue has been resolved.

CRM-1934

Fixed an issue where a sub-grouping on the Summary tab of a report displayed “(blank)” value incorrectly when viewed from a dashboard.

CRM-1940

Fixed an issue where NexJ Model Server provided HTTP 404 response in place of HTTP 403, despite “HTTP Forbidden Response Enabled” flag set to True in the Environment configuration.

CRM-1950

Fixed an issue where the NexJ Server script responsible for ending the process that failed with OutOfMemoryError did not generate a head dump.

CRM-1956

Fixed an issue where starting GlobalSearchSyncBatchJob with empty parameters resulted in java.lang.NullPointerException.

This issue is currently only applicable to NexJ CRM deployments in Cloud environments.

CRM-1998

Fixed an issue where a scheduled report execution did not recover gracefully in case an underlying error occurred.

CRM-2004

Fixed an issue where the "Previous scheduled report execution failed on : Invalid Notification" message was incorrectly displayed if the name of the report and the combined recipient list was longer than 255 characters.

CRM-2055

Fixed an issue where the “>” symbol did not display correctly in Summary columns headers of the PDF export of a report.

CRM-2058

Fixed an issue where the report components added to a dashboard lost their specified caption and description values when expanded.

CRM-2091

Fixed an issue where a dashboard containing a component of a report that the current user is unable to access due to missing privileges, would incorrectly appear empty and an error was generated in the JavaScript console.

CRM-2098

Previously reports containing an association field that referred to a large data collection could fail with an error during an export to CSV. This issue has been resolved.

CRM-2102

Fixed an issue where a report containing a grouping by week on a timestamps field (for example, “Expected Close”) could display misleading grouping data.

CRM-2108

Fixed an issue where a report or a dashboard could not be shared by email to a list of recipients delimited by the semi-colon (“;”).

CRM-2128

Entities that should not have been visible to users who did not have access to the relevant rep code were visible. This has been fixed.

CRM-2155

Fixed an issue where setting `businessHourStart` parameter to 0, in order to effectively disable the calendar shading, incorrectly resulted in 8 a.m. as the start of day.

CRM-2164

Fixed an issue where the GlobalSearchSyncBatchJob did not report on its start and end times.

> This issue is currently only applicable to NexJ CRM deployments in Cloud environments.

CRM-2221

Fixed an issue where selecting both an associated field (for example, “Author”) and its name attribute (for example, “Author > Full Name”) resulted in a blank column added to the report’s CSV export.

CRM-2254

Fixed an issue where an error during sharing a report by email caused the UI to become unresponsive.

CRM-2337, CRM-2348

Fixed an issue where a report that contained a grouping on timestamp fields (for example, “Expected Close”) would generate an unexpected error if viewed by the user in UTC-8 time zone.

Version 24.02

CDM-5302, CRM-23

Prior to this release, when currency conversion was enabled in CRM, if a report included associated fields with currency values and had filters on such fields, then the total number of related records was inaccurate. This issue has been resolved.

CRM-24

Fixed an issue where excluding a field from the configuration of an association also incorrectly removed the same field from the main subject area.

CRM-25

Fixed an issue where currency conversion was not performed on the currency fields added to a report in the preview mode, while the report was being edited.

CDM-5380, CRM-36

When a currency field (for example, "Expected Amount" for a Deal) is added to a report, the amount is now accurately displayed when the System currency unit is different from the currency unit configured in CRM for that field.

CDM-5435, CRM-42

Previously, when a filter was added for an association attribute (for example, Company > Employees) that is also used in a calculation on Summary tab, the calculation displayed incorrect results. This issue has been fixed.

CRM-195

Unexpected run-time errors that occurred during the evaluation of a calculated field formula previously result in the NULL (empty) value displayed for the affected field. This issue has been fixed.

CRM-348

Fixed an issue where an error occurred if an associated field (for example, “Related Opportunities”) and its specific name attribute (for example, "Related Opportunities >

Description") were both added as grouping fields on **Summary** tab. A new validation logic was added to prevent such a scenario from happening.

CRM-430

Tasks for clients secured by rep code were visible by other users that did not have access to that rep code. This has now been fixed.

CRM-454

An issue where the banner carousel becomes unresponsive when the DPI scaling is at 175% or higher has been resolved.

CRM-584

Fixed an issue where cloning a report that contains a large Enumeration field could fail with an error.

CRM-627

Fixed an issue where adding a filter on a calculated field whose formula referenced multiple currency fields (for example, Expected Amount > Actual Amount) could produce incorrect results.

CRM-748

Fixed an issue where the data displayed in SLM workspace did not refresh if the user navigated away and back to it.

CRM-913

Additional date filter validation has been added when using the between operator to verify that both To and From values are specified.

CRM-993

Fixed an issue where the values of Calculated Fields that referenced currency fields with mixed currency unit values could be incorrectly computed if currency conversion was enabled.

CRM-1170

Previously, when any column had been sorted in the "My Contacts' Recent Activities" tab on the Home workspace, the related report was failing to run. This has been fixed.

CRM-1251

Fixed an issue where unexpected errors could be displayed in the UI if the "Save" button is clicked too quickly after "Edit" and the report configuration does not fully load.

CRM-1268

Fixed an issue where it was not possible to schedule a dashboard update without also sharing it by email.

CRM-1282

Resolved an issue where the server potentially logged a failure to create an Elasticsearch index when run in a clustered setup.

CRM-1306

Previously, when the order of opportunity stages had been customized and then a reseed or redeploy was performed, the stages were reverted to the default ordering. This has now been fixed.

CRM-1355

Fixed an issue where using an "equals" date filter on a calculated field containing DATEADD() function could result in matching records excluded from the report.

CRM-1357

Fixed an issue where EntitlementHierarchyRebuildBatchJob that runs on a regular basis could fail with a DataVolumeException.

CRM-1382

Resolved an issue where a batch job that runs periodically and cleans up expired report exports could select too much data for processing and result in high TempDB utilization on the database server.

CRM-1414

Addressed an issue where sorting on a currency field in a report could produce incorrect results if the field contained values originally saved in different currency units and if currency conversion was enabled on the field.

CRM-1454

Addressed an issue where report fields that were explicitly disabled from being sortable (sortable="false" flag was set) were still listed in the Sort Field dialog.

CRM-1457

Fixed an issue where creating a new report from a pre-configured template that contains calculated fields resulted in those calculated fields incorrectly removed from the report definition.

CRM-1580

Previously, testing for Entity Import was incorrectly defaulting to USA. This has been fixed.

CRM-1628

Previously, recreating did not retain all privileges for the Administrators privilege group. This has been fixed.

CRM-1685

Previously, an unexpected error occasionally occurred when a user clicked on "Save filter" under Activities tab for an entity. This has been fixed.

CRM-1714

Fixed an issue where adding a nested collection association filter could result in the report CSV export to fail with an error.

CRM-1751

Previously, when the report currency was changed from its default value and a filter on a currency field was added, it was possible for the data in PDF export to not match the UI and the CSV export. This issue has been resolved.

Version 23.11

CRM-19

An issue where the default Bill-To, Ship-To and Mail-To addresses were not being assigned after adding a business address to a company has been resolved.

CRM-59

When viewing ad hoc report details, if an association does not exist for a specific record, an empty field is displayed for all associated attributes, as expected. Previously, "False" was incorrectly displayed for Boolean fields.

CRM-66

An issue where it was possible to load a filter dialog while another UI request was still being processed has been addressed.

CRM-70

An issue where attempting to add a follow-up task from the My Tasks card on the Home workspace could also include an unrelated last viewed contact in the For field, has been resolved.

CRM-79

Previously, when a user navigated to a household profile by pressing the Back button from a household member's profile, activities that were created from the household profile did not include the household in the For field by default. This issue has been resolved.

CRM-87

Prior to this release, when attempting to create a Schedule Item from the Month view of the Schedule control by selecting a day slot followed by pressing Enter, the New Schedule Item dialog opened without the template prompt and was not set to an All Day event by default. This issue has been resolved.

CRM-187

An issue where repeatedly dismissing alarms could result in an error has been resolved.

CRM-221

On the Reporting workspace, when reviewing the details of a chart in the Visualization tab, only the data to which the user has access is now appropriately displayed, as expected. Drilling into the chart no longer cases a warning message to appear.

CRM-246

Prior to this release, adding certain attributes (such as Articles or Interests) to a report as filters or calculations resulted in an unexpected error. This issue has been resolved.

CRM-260

A one hour offset discrepancy when using the `date-part` function against the Persistence layer has been resolved. Platform requirements have been adjusted to require Microsoft SQL Server 2016 to accommodate this fix.

CRM-262

On the Reporting workspace, when referring to a specific instance of an attribute, it is now consistently labelled as "(Specific) Attribute" in all dialogs. For example, "(Specific) Activities".

CRM-266

A critical issue where the security context was not correctly applied to the WHERE clause of a read request has been addressed.

CRM-350

Previously it was possible to add multiple calculated fields with the same name, which resulted in a bad configuration. This issue has been addressed.

CRM-445

If one or more files in an import zip package was compressed using an unsupported compression method, a clear message to that effect is now displayed.

CRM-558

Previously, if "Include all related records" was set to "Yes", drilling into a chart of the report resulted in fewer related records visible in comparison with the Details tab. This issue has been addressed.

CRM-680

Previously, a report containing associated attributes that were restricted by security displayed "Not Visible" and not blank values, as designed. This issue has been addressed.

CRM-805

Previously, if a sort field and count parameters were both specified, the Details tab of the report could display more records than expected. This issue has been addressed.

CRM-808

Previously, selecting the "week" interval on a date field grouping (for example, "Expected Close") on the Summary tab could result in records being grouped incorrectly. This issue has been addressed.

CRM-892

User groups were incorrectly being shown in folder security for users who didn't have access to the folder. This issue has been resolved.

CRM-902

Client coverage groups assigned "Public" view access were not visible to all users. This issue has been fixed.

CRM-903

Users who are not part of a coverage group and have no edit access to a client's record were able to remove a coverage group from that client's profile. This issue has been fixed.

CRM-905

Previously coverage groups were not visible to all users who belonged to those groups. This issue has now been fixed.

CRM-919

An issue where the read request occasionally incorrectly excluded data from the results if the WHERE clause matched an associated object (for example, Company) that was hidden from the user by visibility rules has been addressed.

CRM-922

Previously, when a Boolean calculated field was added to a report that also contains associated collection fields and the report's CSV export method was set to "Expand to multiple rows, do not repeat common fields", the calculated field's value was incorrectly repeated with each associated collection row. This issue has been resolved.

CRM-923

Multiple discrepancies in how timestamp and date fields were treated between the Export, Visualization and Summary components of a report were addressed.

CRM-935

When access to a CRM model attribute is restricted for the logged in user by a privilege, NexJ Reporting correctly hides such field from any ad hoc reports that contain it. This behavior now also correctly occurs when the field is an association that contains other nested associated fields.

CRM-988

Previously, ENUM values were incorrectly displayed in filters with "specified" or "unspecified" operators. This issue has been addressed.

CRM-1012

An issue where an error would occur when attempting to edit some activities from the preview pane has been resolved.

CRM-1015

Previously, model attributes that were specifically excluded from the reporting subject area could still be referenced in a calculated field formula. This issue has been addressed.

CRM-1053

JSON application configuration import was previously resetting privilege groups after a reseed. This issue has now been fixed.

CRM-1089

Addressed an error (HTTP 403, 404 or 500) that could appear in the JS console due to a missing flatcustom.js file.

CRM-1137

Previously, including PERCENTOF() function in a calculated field formula could result in an unexpected error if the specified grouping field contained too many distinct values. This issue has been addressed. A new configurable parameter under SysAdmin > Statistics > Administration > Reporting > Calculated Fields > "Max PERCENTOF Groupings" was added to specify the maximum number of allowed groupings.

CRM-1146

Validation logic was added to prevent the nesting of PERCENTOF() function inside RANK(), which previously resulted in an error.

CRM-1156

Previously, attempting to clone some of the provided report templates could result in an error due to the maximum allowed number of groupings exceed. The issue has been addressed by updating the problematic templates to be compliant with the default configuration.

CRM-1188

Previously, using "half" relative date component could result in inaccurate results. This issue has been addressed.

CRM-1206

Previously, adding a calculated field that included an aggregate function (for example, SUM()), and using this field in a filter, and also adding another calculated field containing PERCERNTOF() function resulted in an unexpected error. This issue has been addressed by updating the report validation logic.

CRM-1243

A performance regression issue related to displaying preview data while configuring a report was addressed.

CRM-1245

Previously, the "wait" indicator could become permanently stuck if an error occurred while the screen was being loaded. This issue was addressed.

CRM-1347

A user can effectively get locked out of the Contacts workspace if they try to back out (return) out of an entity record too quickly, before the record loads.

CRM-1353

Previously, attempting to select a relative date value (for example, DAY+1) when configuring a report schedule resulted in an error. This issue was addressed.

Version 23.08.2.0

CRM-1024

Prior to this release, using the PERCENTOF function in a calculated field resulted in an unexpected error when one of the arguments equals to 0. This issue has now been resolved and any calculated fields using PERCENTOF when one of the arguments equals to 0 are displayed as blank in the data table.

CRM-1054

Prior to this release, if a report included a filter on an association field to which the end user did not have appropriate privileges, the end user trying to access the report received an error. This issue is now resolved and any report containing filters on fields which an end user cannot access is not displayed for the end user.

Version 23.08

AFL-7983

Previously, Lead Import packages were displaying a status of "in progress" where the process had concluded (completed or failed). This has now been fixed.

AFL-8210, CRM-85

Users are prevented from changing the status of a contact from Client to Lead if a communication method for the contact has not been specified, as expected.

CDM-5080, CRM-30

While building reports that select a large number of records, adding nested association attributes as groupings no longer causes the UI to time out.

CDM-5387, CRM-33

Previously, when CONTAINS function was used as a part of calculated field formula and the `searchText` argument was NULL, the function incorrectly returned TRUE. This issue has been resolved.

CDM-5438, CRM-55

For calculated fields resulting in a decimal numeric value, the decimal precision displayed in the UI and exported CSV or PDF file now matches, as expected.

CRM-1

A sporadic timeout issue when adding or editing Activity Plan steps has been resolved.

CRM-11

Previously, when related entities existed for a contact or company for which a user did not have access, rather than being presented as "Not visible" a user was able to see the name of the related entity. This has now been fixed.

CRM-13

Previously, for specific "Prospect to Client" activity plans an invalid date related warning (due date must be after start date) was being given to a user preventing them from moving forward in the activity plan. This issue has now been fixed.

CRM-14

An issue where an authorized user would not be able to retrieve a top-level reporting record because they did not have access to a nested required association field has been resolved.

CRM-26

If a report contains associated data fields that contain empty values (either missing or hidden by security), clicking the empty cell no longer navigates to another location in NexJ CRM, as expected.

CRM-28

Previously, whenever a Boolean field's value included in a report was hidden by the CRM visibility rules, a "broken" icon was displayed rather than leaving the value blank. This issue was resolved.

CRM-29

When using the minus arithmetic operator in a calculated field formula, a mandatory space is no longer required before its second argument, as expected.

CRM-31

If a calculated field formula contained one or more of the relational operators (for example, "=" or ">=") wrapped in a ISNULL function, the report would fail with an error. This issue was resolved.

CRM-40

Previously, adding a required association field to a report resulted in the primary subject area record to be incorrectly excluded from the report results if the user executing the report was not permitted to access the association field by the CRM data visibility rules. For example, adding the **For** field to an Opportunity report resulted in the entire Opportunity record being excluded in case the user could not access the "For" contact due to the security configuration in place. This issue has been resolved.

CRM-46

Previously, when a mix of relational and logical operators was used in a calculated field formula, an incorrect order of evaluation was applied under certain circumstances. This issue has been resolved.

CRM-48

If, as part of a calculated field formula, a reference is made to a field that the user executing the report does not have access to, the field is now automatically hidden from the user, as expected.

CRM-71

An issue where returning to a workspace where a deleted item was previously in view showing a blank screen has been resolved. The workspace now loads as if it had been opened for the first time.

CRM-75, AFL-8253

An issue where aggressive typeahead support in Object pickers was placing additional strain on application resources has been addressed.

CRM-164

Previously, for reports that selected a lot of data, the Summary tab results could sporadically appear blank. This issue was resolved.

CRM-203

An issue where the ANY clause was generating an invalid query when linked to an extension table for a single association has been resolved.

CRM-223

An issue with using the "between" operator in a filter on a Date, Timestamp, Number or Currency field and not specifying the "To" (upper bound) value has been resolved.

CRM-225

Previously, using some special characters in a text argument to a calculated field function incorrectly resulted in the validation error message. This issue was resolved.

CRM-226

Previously, referencing a collection association field (for example, Related Activities for a contact) in a calculated field formula, without it being used as an argument to a function, resulted in an error. This issue has been resolved.

CRM-280

Previously, when a report was being saved by one person while another user was in the process of updating it, the update could fail with an OptimisticLock error. This issue has been resolved.

CRM-281

Previously, a DataVolumeException error could be seen in the application log resulting from an internal NexJ Reporting housekeeping batch job. This issue has been resolved.

CRM-291

An issue with the ad-hoc reporting feature, where after applying a currency filter, it was possible for aggregate contributions to be duplicated has been addressed.

CRM-296

Previously, under certain conditions, reordering fields while building a report could produce an error. This issue was resolved.

CRM-298

Previously, under certain circumstances, the FA ID filter chip in the Select entities dialog did not display the default value when it was opened. This issue has been resolved.

CRM-323

Previously, under specific conditions in a Cloud environment, exporting a report to PDF could fail. This issue has been resolved.

CRM-329

Previously, under certain circumstances, the dialog opened from the **Splits** filter chip was not responsive. This issue has been resolved.

CRM-526

You can now refer to field names that include parentheses when defining a calculated field, as expected.

CRM-544

Previously, when building a Calculated Field formula, referring to an associated attribute (for example, "Creator" in an Activities report) without including it in a function caused an unexpected error when exporting a report. This issue has been resolved.

CRM-548

Previously, when building a Calculated Field formula, using an incorrect name to refer to an associated attribute (for example, "Creator" in an Activities report) was not prevented by NexJ CRM when it was not included in a function and the beginning of the incorrect name matched the beginning of a valid attribute name. This issue has been resolved.

CRM-565

Previously, adding a filter with a "between" or "not between" operator and not specifying the required "from" and "to" values resulted in an error and the report not being saved. This issue was resolved.

CRM-628

An issue where a scheduled report that took longer than 5 minutes to complete could enter a bad state, run indefinitely and consume a large amount of space on the database server, was resolved.

CRM-661

Previously, when a contact had been assigned a status of "Lead" and had a related company connected to the contact, that related company was not being displayed in the contact workspace Leads subject area. This has now been resolved.

CRM-666

An issue where relative date filter selections were not being retained in saved filters has been addressed.

CRM-673

Previously, Lead Status Enumerations that had been set to inactive were still being presented to the user. This issue has now been fixed.

CRM-674

Previously, while adding a calculated field to the report, accidentally clicking the **Apply** button more than once resulted in multiple copies of the same calculated field being added and an error message being displayed. This issue was resolved.

CRM-744

Previously, when exporting a report to CSV a currency symbol was appended to any field header that contained "currency" in its name. This issue was resolved.

Version 23.05.1.0

CRM-226

Previously, when building a Calculated Field formula, referring to a collection association field (for example, Related Activities for a contact), without it being used as an argument to a function, resulted in an error. This issue has been resolved.

CRM-526

You can now refer to field names that include parentheses when defining a calculated field, as expected.

CRM-544

Previously, when building a Calculated Field formula, referring to an associated attribute (for example, "Creator" in an Activities report) without including it in a function caused an unexpected error when exporting a report. This issue has been resolved.

CRM-548

Previously, when building a Calculated Field formula, using an incorrect name to refer to an associated attribute (for example, "Creator" in an Activities report) was not prevented by NexJ CRM when it was not included in a function and the beginning of the incorrect name matched the beginning of a valid attribute name. This issue has been resolved.

Version 23.05

AFL-6721

When managing the statuses in an activity plan, users should not be able to remove all statuses. They are now prevented from doing this, as expected.

AFL-6903

When the B2B mode for the classic Leads feature is enabled, you can no longer create a new lead without linking a related company, as expected.

AFL-7365

Prior to this release, when a recurring meeting was created around daylight savings time (particularly all-day meetings), the meeting would be displayed as if happening on two days or a duplicate meeting would be created. This issue has now been fixed.

AFL-8127

When a user attempts to delete an item from the Batch Processes workspace, a user-friendly message is now displayed.

AFL-8212

Dialogs has been updated to always place the initial focus on the Description field, as expected.

AFL-8226

An issue where some application details available on the About NexJ CRM dialog were not included as part of the **Email Support** option has been resolved.

AFL-8239

An issue where navigation URLs would generate links that caused 500 Internal Server Error messages has been resolved.

AFL-8314

Previously a multi-value column in a data table (such as the **For** or **Assign To** fields in the **Activities** list) would show a deleted error dialog if the user clicked an empty portion of the cell. This issue has been resolved.

AFL-8320

For one client, tasks that had been deleted were re-appearing under certain conditions. This issue has been resolved.

AFL-8321

Prior to this release, some households and contacts that had been deleted were re-appearing for some users under limited circumstance. This issue has been resolved.

AFL-8336

A filtering issue when using the "not equals" and "does not contain" operators, where some results with undefined values were not being returned in the result set, has been resolved.

AFL-8340

An entity preview issue where deleting a quick note would close the preview has been resolved.

CDM-4639

Previously, in rare cases, adding associated collection fields as groupings on the **Summary** tab of a report could cause the calculation results to be displayed incorrectly. This issue has been resolved.

CDM-5029

Previously, switching between the available options in the Export section on the **Settings** tab for a report triggered an update of the report data, which could lead to poor user experience. This issue has been resolved.

CDM-5225, CDM-5377

Previously, attempting to save an invalid report (for example, a report with a filter value missing) resulted in all report configuration changes being lost. This issue has been resolved.

CDM-5233

Previously, when a filter was added on a currency field in a report, the report data was incorrectly filtered using the currency units persisted in the CRM database and not the report currency units as expected. You can now specify the currency unit for each filter.

CDM-5265

Previously, reports that included association fields that were nested three levels deep (for example, Coverage >User >Addresses) were not exported correctly. This issue has been resolved.

CDM-5287

Previously, upgrading and seeding an environment containing ad hoc reports that were built on a secured subject area failed with an error. This issue has been resolved.

CDM-5290

Previously, when some timestamp fields (such as End Time for an Activity) were included as calculations in Summary tab of a report and then exported to Microsoft Excel, they were displayed as date values with their time components removed. This issue has been resolved.

CDM-5293

Prior to this release, when a report containing currency fields was exported to a CSV file, the formatting applied to such fields prevented Microsoft Excel from automatically recognizing them as numeric values and performing numeric calculations on them. This issue has been resolved.

CDM-5300

Previously, Report Administrators could see other users' private reports in the **My Reports** tab, which was misleading. The issue has been resolved.

CDM-5306

Previously, certain reports that were created in NexJ CRM version 22.09 or earlier and that contained "(Specific)" filters on association fields became inaccessible after the system had been upgraded to NexJ CRM version 22.11 or later. This issue has been resolved.

CDM-5370

Previously, reports containing multiple filters could take a significant time to update. Enhancements were made to optimize the report execution times and to improve user experience.

ECRM-31612

An issue when attempting to de-serialize JSON containing an array sub-collection has been resolved.

ECRM-31675

Prior to this release, deleting an Exchange sync link resulted in a broken Exchange staging object reference, which appeared during the staging cleanup job. This issue has been resolved.

ECRM-31861

Prior to this release, an expected error would occur during Exchange inbound synchronization, when attempting to transform a recurrence. This issue has been resolved.

ECRM-31878

Previously, certain phone number types included in merged documents were not printed correctly, because of a missing formatting definition. The required formatting definition has now been implemented and all phone numbers in merged documents are printed as expected.

ECRM-31916

On the New Opportunity/Edit Opportunity dialog, the **Group** field on the **Security** tab was displaying incorrect security values. This issue has been fixed.

ECRM-31949

A Kafka-related TLS Mutual Authentication issue, where NexJ Server was not presenting a configured client certificate for the initial connection, has been resolved.

Version 23.02.0.1

CDM-5377

Previously, attempting to save an invalid report (for example, a report with a filter value missing) resulted in all report configuration changes being lost. This issue has been resolved.

Version 23.02

AFL-6425

Sorting inconsistencies in the **For** field on the New Birthday Mailer dialog has been corrected.

AFL-7355

An issue where a data table column having a large amount of text would result in the column text not being displayed has been resolved.

AFL-7479

An issue where a user could select a previously removed filter favorite which resulted in an unexpected error has been resolved.

AFL-7768

On the Filters and lists dialog, the number of items returned in a search now accurately reflects the number of items that the user has access to. Filters or lists that exist but are not available to the user are no longer included in the count.

AFL-7840

When resizing a window while on the Batch Process workspace, the error detail column was intermittently disappearing. This issue has now been resolved and the error detail is displayed as expected.

AFL-7861

An issue where when filtering basic attributes using the "not equals" and "does not contain" operators were not returning candidates having an undefined target attribute has been resolved.

AFL-8003

An issue where some menu options appeared inactive when a create dialog had been opened from a picker dialog has been resolved.

AFL-8033

An issue in cloud environments where the login prompt after session expiry would appear multiple times has been resolved.

AFL-8119

Prior to this release, some dialogs did not place the focus on the first input field when the dialog was opened. This issue has been resolved.

AFL-8136

An issue that caused occasional unexpected query requests when users navigated to the Activities tab of the Contacts workspace has been resolved.

AFL-8141

An issue where some workspace cards could potentially overlap after opening the notification drawer has been resolved.

CDM-4783

Associated collection data that may be hidden via CRM data visibility rules no longer generates extra blank lines in a CSV file.

CDM-4811

When you create a new Users report and add a filter with the **Entitlements** > **(Specific)** attribute selected, the filter is now created as expected.

CDM-4868

You can now export ad hoc reports to PDF or CSV file formats when you are using an iPad.

CDM-4942

When you use NexJ Reporting, the column header for a complex column no longer occasionally displays with the leading text showing as "undefined".

CDM-4944

The summary grouping on report dates is no longer inconsistent depending on the time zone.

CDM-4954

When you include currency fields through associations in a report (for example, currency fields for a related deal in a call records report), the fields no longer appear blank when there is data.

CDM-4985

Date type attributes in associations for reports are no longer erroneously exported as timestamps.

CDM-4987

Calculations on date type attributes are no longer erroneously displayed in the **Summary** tab for reports as timestamps.

CDM-5046

The attributes that are available for selection in the **Add Fields** typeahead field in the **Details** tab in the Report Builder for ad hoc reports now match the attributes that are available for selection in the Add Fields dialog.

CDM-5082

Prior to this release, the **Summary** tab for reports with very large amounts of data occasionally became unresponsive under specific conditions. This issue has now been resolved.

CDM-5093

Entities that have been soft-deleted or hidden via data visibility rules in NexJ CRM no longer match filters in ad hoc reports.

CDM-5161

When you have previously created a report from a template with sub-filters for associated filters, and then you attempt to create a new report from the same template, the sub-filters no longer disappear from the configuration.

CDM-5195

Any email addresses specified for a report on the **Settings** tab in in the **Email Target Addresses** field now persist after the report is shared, as expected.

ECRM-26558

In environments with the Hierarchical Access Model enabled, if a contact is a participant of a private meeting and the contact's Rep Code is updated, then that meeting is no longer exposed to all users having access to the new Rep Code.

ECRM-28680

Metaclass instances with the `readable` attribute set to `false` no longer appear in the invocation result.

ECRM-31259

When you delete a task or schedule item from the NexJ CRM UI, this action is now logged in the Audit Trail page in NexJ Admin Console as expected.

ECRM-31664

The schema NexJ generates erroneously added an empty namespace for all enum types in the serialized Avro message. This issue has been resolved.

ECRM-31665

Previously, NexJ did not adhere to Apache Avro standards with regard to non-mandatory union types. This issue has been resolved.

ECRM-31711

If a template is not available for a matched contact for a birthday mailer, the appropriate error message is now displayed as expected.

ECRM-31748

If you attempted to serialize a message to a Kafka broker, an Avro enumerations error was generated. This issue has been resolved.

ECRM-31759

Prior to this release there was an Issue that occurred when printing a PDF from a secured document send by email PDFs. This issue has now been resolved.

ECRM-31828

A WebSphere issue where having a URL encoded session cookie value could cause an error has been addressed.

Version 22.11.0.1

ECRM-31664

The schema NexJ generates erroneously added an empty namespace for all enum types in the serialized Avro message. This issue has been resolved.

ECRM-31665

Previously, NexJ did not adhere to Apache Avro standards with regard to non-mandatory union types. This issue has been resolved.

ECRM-31748

If you attempted to serialize a message to a Kafka broker, an Avro enumerations error was generated. This issue has been resolved.

Version 22.11

AFL-7300

When viewing contact details on mobile devices, you were unable to scroll in the **Calendar** tab. This issue has been resolved.

AFL-7435

Previously, when you were removing contacts from a list in bulk on the Contacts workspace, the search feature did not work, which meant you had to scroll to locate the list from which you wanted the contacts removed and deselect the list. This issue has been resolved.

AFL-7585, AFL-3554

An issue where the scroll position on a data table was unexpectedly moving on repeated attempts to sort a table column has been addressed.

AFL-7717

Previously, when you attempted to add an address to a household member in the Select an address dialog, the search field displayed some text that was unclear where it referred to a Full Name instead of an Address Name. This issue has been resolved.

AFL-7804

Simultaneous error reference codes will be displayed one dialog at a time that needs to be acknowledged by the user.

AFL-7805

The filter seeding logic has been enhanced to handle upgrades where subjects are renamed or removed. The seeding process cannot access or map the old subject names to new subject names, and there may be functional consequences due to a transition to a new subject area, which means a manual upgrade step may be required. For example:

UPDATE NJFilter SET subject='LEAD-ALL' WHERE subject='LEADS-ALL';

AFL-7824

Previously, when you changed the resolution or reduced the screen size, the filter fields window size was condensed. This issue has been resolved.

AFL-7865

Previously, when you opened the classic version of NexJ CRM, added a rule on the Customize workspace, edited the criteria for the rule, and selected "is one of" as a condition, an error was displayed. This issue has been resolved.

AFL-7866

Previously, the user interface did not render correctly in some cases when it was altered or adjusted based on JavaScript logic , and required a user action to render correctly. This issue has been resolved.

AFL-7879

An issue where a user without access to an entity could open an empty entity preview pane has been resolved. Instead of opening an empty preview, a suitable message is printed to the screen.

AFL-7919

The name for the batch process type that is used to update a campaign's participant status in the Select a batch process type dialog on the Batch Processes workspace has been changed to "Update Campaign Participant Status."

AFL-7939

Previously, when you entered new text into a rich text dialog, and a reminder notification was triggered, the rich text field was reset to its prior value. This issue has been resolved.

AFL-7940

Memory leak issues involving popup action buttons and popup client states not being unregistered on close have been resolved.

AFL-7961

Previously, there was no default sorting in the user interface for the update service level batch process. This issue has been resolved by adding default sorting to the Touch Type column.

AFL-7965

Previously, the Preview sidebar contained a Go to Contact button that was incorrectly labeled. The button name has been changed to View Details.

AFL-7976

Previously, the interaction filter options section in the Specify Report Parameters dialog for the Detail Report on the Contacts workspace, the Briefing Book on the Schedule workspace, and the Service Request Detail Report on the Service Requests workspace had inconsistent labels for the same section. This issue has been resolved, and the labels for the Detail Report refer to "activities" and not "interactions", and the "Interaction options" and "Activities options" labels have been removed.

AFL-7996

The unsupported URL option for inserting images has been removed from the rich text editor. Instead, images should be added using either the upload option or paste functionality.

AFL-8002

Previously, an "instance missing" error could thrown when you opened a Campaign workflow. This issue has been resolved.

AFL-8045, AFL-8054, AFL-8058

Previously, you were able to delete a template on the Customize workspace that was associated with a campaign workflow action item. This issue has been resolved.

CDM-4823

Previously, exporting complex reports with a large number of associations and collections to CSV format could result in an error. This issue has been resolved.

CDM-4832

Previously, when grouping ad hoc reports data by week, weeks with zero values were omitted from the charts instead of being displayed as zero bars (gaps).

CDM-4869

Previously, when you added a dashboard item that had a report detail type, and updated the dashboard, the item was misaligned. This issue has been resolved.

CDM-4892

Previously, when you added a date field as a grouping to a report's visualization in the Report Builder, saved the report, and updated it in the **Visualization** tab in the Report Viewer, an err.Query.GroupBy.unsupportedDatePart error could be thrown. This issue has been resolved.

CDM-4905

Previously, it was possible to include an association attribute in an ad hoc report, even if such attribute was protected by a privilege that was not assigned to the user building the report. This issue has been resolved.

CDM-4909

Previously, the **Full Name** field included in Contacts, Companies, Users and Leads subject areas was limited to 100 characters wide, but entities could have longer names that exceed 100 characters. This issue has been resolved by increasing the limit to 500 characters wide.

CDM-4988

Previously, filtering on date type attributes in ad hoc reports was affected by localization. This issue has been resolved.

CDM-5104

Previously, filtering on date type attributes for ad hoc reports returned the incorrect result for the range of dates selected for the filter.

CDM-5124

Previously, exported ad hoc report results could display a different date value than was shown in the user interface for some associated attributes. This issue has been resolved.

CDM-5125

Previously, a date type attribute, such as "Expected Close" for a Deal, displayed a value in ad hoc reporting that was different from the value displayed in NexJ CRM. This issue has been resolved.

ECRM-29258

An issue that potentially exposed single sign-on for NexJ CRM to Cross-Site Request Forgery (CSRF) has been resolved.

ECRM-31591

An issue where attempts to delete a metaclass instance resulted in duplicate delete events being fired has been addressed.

ECRM-31629

Previously, external reports that were removed from the `extreport` folder were still being seeded into the application. This issue has been resolved.

ECRM-31633

Previously, when you navigated to the **Service Levels** tab in NexJ Admin Console, and changed the name of a service level, the updated name didn't appear until the browser session was restarted. This issue has been resolved.

ECRM-31637

Previously, you were unable to update an address for a household after you deleted a household member. This issue has been resolved.

ECRM-31638

Previously, you could not update communications information for a household after you deleted a household member. This issue has been resolved.

ECRM-31667

Previously, developers were unable to log in to a local NexJ CRM server with OAuth using a deployed Keycloak, and test integrations between CRM and Engage. This issue has been resolved.

ECRM-31684

Previously activity, opportunity, and task templates, and Service Level Management customizations reverted to default settings each new release for Cloud deployments. This issue has been resolved.

Version 22.09

AFL-6641

On the Service Level Management workspace, several filter chips and dialogs have been improved to add clarity and ease of use, including the Period, Service Level, and Touch Status filters.

AFL-6860

An issue that meant that touches were not accurately scheduled for contacts created on the last day of a month has been resolved.

AFL-7102

Previously, when you were managing filters and lists, the Edit List dialog erroneously showed "Contacts" as the default type for all lists types. This issue has been resolved.

AFL-7239

An issue that caused excessive lazy loads when updating the planning or progressed status of a campaign workflow template has been resolved.

AFL-7240

An issue that caused excessive lazy loads when creating the campaign workflow instance of a campaign has been resolved.

AFL-7362

An issue where some cards could possibly overlap when using the fluid layout has been resolved.

AFL-7395

Previously, when you expanded one card on a page with multiple cards (for example, the detail page for a contact), the other unrelated cards would oscillate in place. This issue has been resolved.

AFL-7428

Previously, the client state page size for data tables reverted to the default value if the application was refreshed multiple times in succession. This issue has been resolved.

AFL-7486

Previously, when you created a recurring schedule item, set a reminder for the item, received a reminder for the item, clicked the **View more detail** button in the Reminders dialog for the item, and edited the schedule item to change the recurrence, the preview for the item in the application sidebar became blank. This issue has been resolved.

AFL-7622

An issue where the filter card selected by the user could be inadvertently reset to the first filter card and could be subsequently loaded from the client state has been resolved.

AFL-7629

Previously, the date values in filter chips on the Import workspace were not being saved to the client state. This issue has been resolved.

AFL-7651

An issue where dynamic updates to the nullCaption of filter fields were not being reflected in the UI has been resolved.

AFL-7675

An issue where a batch operation to update custom fields in a mixed list (companies and contacts) could result in some entries being skipped has been resolved.

AFL-7688

Previously, batch process items showed as outstanding in Activities reports. This issue has been resolved.

AFL-7703

Previously, when you selected the **SLM Touches Report** menu option on the Service Level Management workspace, selected the current period, and the touch as a proactive touch, selected **Show Interactions**, and generated the report, scheduled touches were not always included in the report. This issue has been resolved.

AFL-7704

Previously, when you added a new description for a category in NexJ Admin Console, logged in to NexJ CRM and selected a contact on the Contacts workspace, navigated to the **Detail** tab, and clicked the **Add** button + on the Categories card, the description column was blank for all categories in the Select a category dialog. This issue has been resolved.

AFL-7729

An issue where Service Request workspace filter chip definitions were not being restored to filter cards correctly has been resolved.

AFL-7752

An issue that meant that mda.scm data modules did not log thrown exceptions during generation has been resolved.

AFL-7826

Previously, the Batch Processes workspace did not show an error message for all associated entities when a user's machine could not connect to an email server. This issue has been resolved.

AFL-7835

Previously, workspace cards could overlap or display in the wrong location when the size of the window was changed. This issue has been resolved.

AFL-7854

Previously, the table columns jiggled when you hovered over batch processes on the Batch Processes workspace. This issue has been resolved.

AFL-7941

The placeholder text in the search field on the Import workspace incorrectly displayed "Name" instead of "Search by description". This issue has been resolved.

CDM-4672

Previously, CRM attributes that were explicitly excluded in the subject area definition, were displayed when you used the type-ahead functionality in the **Add Filters** field in the Report Builder. This issue has been resolved.

CDM-4724

Previously, the captions specified in the subject area for a report were not applied to the CSV export for the report. This issue has been resolved.

CDM-4760

Previously, deleting a reporting subject area, for which reports were previously configured, caused an error during the CRM upgrade process. This issue has been resolved.

CDM-4767

Previously, when you attempted to export a report with large amounts of data (> 10,000 rows by default), and the export failed, you didn't receive an error message to indicate that the export has failed. This issue has been resolved.

CDM-4769

Previously, no user notification was provided when a scheduled report failed to execute. This issue has been resolved.

CDM-4791

The filter dialog search bar is now disabled for associated data where the name attribute is not persisted. Previously trying to use the search bar would result in an error.

CDM-4803

Previously, attributes in a second-level association are not searchable in field or filter selection dialogs. This issue has been resolved.

CDM-4870

Previously, when you added reports to a dashboard and clicked the **Update Dashboard** button , the reports might be updated twice. This issue has been resolved.

CDM-4871

Previously, when you saved a report and updated it, the table in the **Summary** tab sometimes displayed blank fields for groupings, zeros for counts, and an invalid timestamp for a short period of time before loading the full table correctly. This issue has been resolved.

CDM-4891

When users were previously deactivated, the schedules for their reports were not removed. This issue has been resolved.

CDM-4998

Previously, when you created a new Companies report, navigated to the **Filters** tab, added (Specific) Company Members, and clicked **Select** to open the Enter (Specific) Company Members filter dialog, the list displayed "Report:fullName" instead of "Full Name" as a caption. This issue has been resolved.

ECRM-23936

Previously, an error was thrown in the UI when you attempted to generate a predefined report when the desired font was not available. This issue has been resolved.

ECRM-29209

Previously, if you selected **Pre-Populate** for an address type in NexJ Admin Console, and you added a contact in NexJ CRM, then the address type was added to the Addresses card in the **Detail** tab for the contact. However, if you had pre-populated a communication type in NexJ Admin Console, NexJ CRM did not add the communication type in the Communications card when you added a contact. This issue has been resolved.

ECRM-31007

An issue where the `auto` flag for the Use SSL Security property of a Kafka channel was being ignored has been resolved.

ECRM-31495

An issue that meant that errors encountered with inbound Exchange synchronization were being masked due to a scripting error has been resolved.

ECRM-31499

Previously, an apply import action process could get stuck in waiting status. This issue has been resolved.

ECRM-31500

An issue with the flexible authenticator interceptor that could trigger heap corruption when running NexJ Server on the Windows operating system has been resolved.

ECRM-31504

Previously, the BatchUpdatePlainConvertToHTMLCommand could get stuck in a running state. This issue has been resolved.

ECRM-31545

An issue that could prevent the application server from starting due to a mismatched kafka-clients version number that was specified in the deployment package has been resolved.

ECRM-31583

Previously, when you selected the **Briefing Book Report** option on the Schedule workspace, chose a status, and generated the report, interactions for all statuses were erroneously provided in the report. This issue has been resolved.

ECRM-31594

Previously, you were unable to delete a household when there was synced communication information (for example, a phone number) for a deleted contact member. This issue has been resolved.

Version 22.06

AFL-6687

An issue where applicable contact types could be removed when attempting to add a category to an entity has been resolved.

AFL-7092

An issue that generated an unexpected error when you tried to add a second campaign workflow template with the same name as the default campaign workflow template has been resolved.

AFL-7344

The wrong icon displayed beside the **Service Level** menu option when you selected contacts on the Contacts workspace, clicked **More Actions** ⋮ , and selected **Update**. This issue has been resolved.

AFL-7473

An issue where the filter metadata loader generated an incomplete field configuration when a text query field declaration was missing has been resolved.

AFL-7552

Previously for dialogs, when a composite layout with a cols attribute was the root view, the `-spanX-Y` CSS class did not get applied for child views as there was no parent holder class in the view hierarchy. This issue has been resolved.

AFL-7584

An issue introduced in the latest version of iOS on iPhone (15.4.1) where date values selected by the user were not being saved has been resolved.

AFL-7617

Previously, when you viewed more details for a reminder, the entities in the **For** and **Assign To** fields in the application sidebar were not ordered correctly. This issue has been resolved.

AFL-7624

An issue where the type and status interaction filter options for predefined reports displayed incorrectly has been resolved.

CDM-4604

Previously, reordering in the **Visualization** tab for reports was not saved in exported charts, and the columns were organized in alphabetical order. This issue has been resolved.

CDM-4726

Previously, when you created a report with a filter, saved it, edited the report's name, and resaved it, an error was generated. This issue has been resolved.

CDM-4744

Previously, when you added a date or time stamp field to a report, made the field a filter, selected "between" as the operator, provided a value for the **From** field but not a value for the **To** field, and saved the report, no error message was generated as expected. Instead, the report was saved, and displayed an unknown icon for the **To** value in the filter. This issue has been resolved.

CDM-4768

Previously, the selection dialogs for fields and filters for reports displayed different lists of attributes. This issue has been resolved, and any field available for inclusion in a report is also available for filtering.

CDM-4809

In some configurations, when nested associations were included, the UI was incorrectly labeling associated collection fields in the report. The name attribute of the top-most associated attribute was used instead of the name specified in the subject area. This issue has been resolved.

CDM-4827

Previously, grouping reports by date or date-time attributes displayed incorrect values in the **Summary** and **Visualization** tabs in the Report Viewer. This issue has been resolved.

ECRM-31104

The Kafka Sender auto.register.schemas Producer property is now supported.

ECRM-31105

A NullPointerException that occurred when attempting to send an Avro Format message on a Kafka channel without the `schema.registry.url` property defined has been addressed.

ECRM-31125

Optional diagnostic logging has been enabled for Kafka channels.

ECRM-31295

Previously, some batch jobs that were no longer in execution would display with a Waiting or Running status on the Process page in NexJ Admin Console. This issue has been resolved.

ECRM-31440

An issue where JMS queues could not be successfully instantiated in the NexJ CRM application has been resolved.

Version 22.04.1.0

AFL-7552

Previously for dialogs, when a composite layout with a `cols` attribute was the root view, the `-spanX-Y` CSS class did not get applied for child views as there was no parent holder class in the view hierarchy. This issue has been resolved.

AFL-7587

Previously, when you selected a contact on the Contacts workspace, selected the **Detail** tab, added a custom field that pointed to another entity, and selected **Go to Contact**, instead of displaying the detail page for the entity, an "err.scripting.callcc" error was generated when you selected the **Summary** tab. This issue has been resolved.

CDM-4809

In some configurations, when nested associations were included, the UI was incorrectly labeling associated collection fields in the report. The name attribute of the top-most associated attribute was used instead of the name specified in the subject area. This issue has been resolved.

ECRM-31440

An issue where JMS queues could not be successfully instantiated in the NexJ CRM application has been resolved.

Version 22.04

AFL-6892

Previously, when you were creating a follow-up for a task or schedule item for a contact, edited the **Assign To** field to remove your name, and tried to save the task or schedule item, a general error message displayed that stated that the task or schedule item was invalid. This issue has been resolved by providing improved error messaging, which states that the **Assign To** field must include your name as the organizer.

AFL-6958

Previously, when you navigated to the Service Requests workspace, or Home workspace and selected the **My Contacts' Recent Activities** tab, clicked on the **For** filter chip, and clicked on the **Rep Code** filter chip while the Select an entity dialog for the **For** filter chip was open, selected a value in the **Rep Code** field, and clicked **Apply**, the browser console erroneously logged a "mde.entity-handle-filter-change add button not found!" error message twice. This issue has been resolved

AFL-7289

Previously, when you selected multiple contacts on the Contacts workspace, clicked **Email**, added and modified text in the rich-text editor, clicked ✕ to close the dialog, and clicked **Cancel** in the "Discard all unsaved changes" prompt, the contents of the rich-text editor was unexpectedly lost. This issue has been resolved.

AFL-7324

Previously, when you added a meeting or task workflow action to a campaign for a user who has multiple team member roles, an unexpected error was thrown when you started the campaign because the application tried to add the same user multiple times to the action. This issue has been resolved.

AFL-7340

Previously, when you logged in to NexJ CRM as an administrator, navigated to the Tasks workspace, edited a task, selected the **Audit Trail** tab, and selected the **User** filter chip, the application froze, and you were forced to refresh the page in your browser. This issue has been resolved.

AFL-7387

Previously, when you attempted to run a Detail Report for users after selecting a subset of users on the Contacts workspace instead of generating the report an error was thrown due to insufficient visibility. This issue happened if you selected the **Current Contact List**, **Show**

Interactions, and **RTF** parameters in the Specify Report Parameters dialog. This issue has been resolved.

AFL-7400

Previously, when you logged in to NexJ CRM as a Microsoft Exchange user, navigated to the Schedule workspace, added a meeting, added a participant (with Exchange links), selected the **Attendees** tab, set the email notifications for the participant to be **Yes**, saved the meeting, and observed the Send Email Notifications dialog, a blank icon appeared on the dialog. This issue has been resolved.

AFL-7450

An issue where an empty banner card was being displayed on screen has been resolved.

AFL-7455

Previously, the `mda.FieldPicker#fieldVisible` API set the filter field visibilities on a `_fieldVisibilities` class variable. This prevented field pickers of the same filter type from showing a filter field with different visibilities. This issue has been resolved.

AFL-7462

An issue where the default event on filter fields would not fire if the multi property value is set to `true` has been resolved.

ECRM-31020

Previously, when you logged in to NexJ CRM as a Microsoft Exchange user, updated the recurring pattern for a meeting that you had created on the Schedule workspace, and for which there were multiple attendees and invitations had been sent out, you could no longer edit the meeting. This issue has been resolved.

ECRM-31183

Previously, if you attempted to deactivate users in NexJ Admin Console who covered more than 4096 entities, an error was generated. This issue has been resolved.

ECRM-31197

Previously, users who had access to NexJ System Admin Console experienced a JMXProperty'refreshClusteredStats error when they navigated to the Statistics page, and tried to view the current node information. This issue has been resolved.

ECRM-31234

Previously, when you set the `applicationType` attribute to equal `wm` in your environment, and recreated or upgraded your database, an "Invalid Template" exception was thrown. This issue has been resolved.

Version 22.03.2.0

AFL-7450

An issue where an empty banner card was being displayed on screen has been resolved.

AFL-7477

An issue where a view layout would not align with the metadata configuration has been resolved.

AFL-7552

Previously for dialogs, when a composite layout with a cols attribute was the root view, the `-spanX-Y` CSS class did not get applied for child views as there was no parent holder class in the view hierarchy. This issue has been resolved.

CDM-4809

In some configurations, when nested associations were included, the UI was incorrectly labeling associated collection fields in the report. The name attribute of the top-most associated attribute was used instead of the name specified in the subject area. This issue has been resolved.

ECRM-31440

An issue where JMS queues could not be successfully instantiated in the NexJ CRM application has been resolved.

Version 22.03.1.0

AFL-7496

Previously, when you logged in to NexJ CRM using the Microsoft Internet Explorer version 11 browser, navigated to the Contacts workspace, and then navigated to a different workspace, you were prevented from opening a filter. This issue has been resolved.

CDM-4462

Previously, it was not possible to exclude an association field from the subject area definition by using a subject area augment. For example, `<Augment`

`for="report:Contacts">,<Association name="Custom Fields" excluded="true"/>` did not produce the intended results. This issue has been resolved.

CDM-4707

Previously, when you created a report, added a number of collection fields to it, saved it, and exported it to CSV format, the order in which records appeared in the CSV file did not match the order in which they were displayed in the UI. This issue has been resolved.

CDM-4790

Previously, when you selected attributes of a sub-collection as fields in the **Detail** tab in the Report Builder, some of them were displayed as individual columns in the **Details** tab of the report, rather than being a part of the collection. This issue has been resolved.

Version 22.03

AFL-4250

Previously, you were able to add a user with the same role to a coverage group multiple times without receiving an error. This issue has been resolved.

AFL-5595

Previously, for users who operated in time zones with a sufficiently large offset from UTC, say +10 or -10, date entry fields that defaulted to the current day could appear with either yesterday's or tomorrow's date selected. This issue has been resolved.

AFL-6450

Previously, when you created touch types on the Service Level Management page in NexJ Admin Console, the value provided for the **Default value** field in the Add Touch Type Configuration dialog wasn't respected in the Application Foundation Layers (AFL) UI, which meant that touches wouldn't enable or disable given the default value. This issue has been resolved.

AFL-6642

Previously, when you were editing the service level properties for a touch type for contacts, and you selected the **Specific date for all selected contacts** option in the **First Touch Target** field, and attempted to save, an error was generated concerning a null start date because the **Start Date** field was not treated as a required field. This issue has been resolved.

AFL-6898

Previously, changes made to entities or activities were not refreshed in the preview drawer. This issue has been resolved.

AFL-6970

Previously, when the **For** filter chip was selected and set to "specified" on the Tasks workspace, the full data set did not load into the data table, and paging was disrupted. This issue has been resolved.

AFL-6998

Previously, when the Schedule workspace was opened on mobile devices, the margin for the floating action button appeared at the base of the display and reduced the space for the calendar view. This issue has been resolved.

AFL-7043

Previously, when you double-clicked the empty space beside filter chips in a workspace to launch the filter chip picker, and after you selected a filter field, the corresponding dialog was not immediately opened. This issue has been resolved.

AFL-7078

Previously, NexJ CRM 9.X did not make Engage requests with a valid JWT token once it had expired and was refreshed.

AFL-7105

Previously, on the Customize workspace, under the Manage Business Processes function, the UI indicated that users could both add forms based on a business process template or select an existing CPM (Process Management) form. Only the choice of selecting an existing Process Management form is valid. The other choice appeared in error and has been removed.

AFL-7224

Previously, mail merge did not detect and inform the user if there were duplicate merge tokens. This issue has been resolved.

AFL-7259

Previously, when you clicked on **Update Status** for a participant in a campaign to change the status for the participant, you were presented with a list of menu options that contained all the possible statuses in the database instead of just the statuses in use by the campaign. This issue has been resolved.

AFL-7261

Previously, the Participants by Status chart for a campaign erroneously displayed all the available participant statuses that were available in NexJ CRM instead of only displaying the participant statuses that were available in the workflow for the campaign. This issue has been resolved.

AFL-7264

The **Target Audience** field in the Add/Edit Campaign dialogs and the **Adds Participants to Campaign Based on the Target Audience** command on the Campaigns workspace have been removed. This feature was previously included for compatibility with earlier releases.

AFL-7278

Previously, when you had filtered your Contacts workspace to only show households, created a task for a head of household, returned to the households data table, clicked on the household name, and selected the **Activities** tab, the task did not display in the data table. To display the task you had to repeat your actions by returning to the households data table, clicking on the household name again, and reselecting the **Activities** tab. This issue has been resolved.

AFL-7347

Previously, when you selected a contact on the Contacts workspace, added an activity plan in the **Activities** tab by selecting an existing activity plan template, added a task as an assigned step in the **Steps** tab, and edited this assigned step, the UI froze, and the edit dialog didn't open. This issue has been resolved.

CDM-4446

Previously, if you configured your Reporting server to use streaming notifications, and your browser could not connect to the NexJ Push Redirector (for example, due to a network firewall rule), it was not possible to export or update reports. The correct behavior was to revert back to a polling pattern in order to maintain functionality. This issue has been resolved.

CDM-4484

Previously, NexJ CRM users who were assigned the rpt:PrivateReportManage privilege were able to create their own reports but could not export them. This issue has been resolved.

CDM-4563

Previously, when you added collection fields in the **Details** tab in the Report Builder they were always displayed as the last column in the preview data table regardless of the order you specified for fields. This issue has been resolved, and the order specified for fields is now used in the preview data table.

CDM-4627

Previously, when you created and saved a report on the Reports workspace with filter parameters, and then edited it, the filter parameters could disappear. This issue has been resolved.

CDM-4642

Previously, adding a “date” type attribute, such as a Date of Birth, in a report resulted in its value being treated as “datetime”, and it was localized to the local user’s time zone. This issue has been resolved.

CDM-4660

Previously, when you navigated to the Reports workspace, created a report, selected the **Visualization** tab, configured the Funnel or Area Range charts, saved the report, and clicked **Export to PNG**, the charts were not exported. This issue has been resolved.

CDM-4661

Previously, when you created a report or a dashboard, configured a schedule, that included an "end time", for updating and sharing the report or dashboard by email, the last scheduled execution did not happen. This issue has been resolved.

CDM-4673

Previously, fields were available for filtering by adding the field, and then choosing to add them for filtering, but the Add Filters dialog didn't offer some of those fields for filtering. This issue has been resolved.

CDM-4709

Previously, when you created a new Activities report in the Report Builder, and added **Creator Entitlements** fields (for example, **Creator Entitlements** > **Branch Code**), these fields were not displayed in the preview for the report. This issue has been resolved.

CDM-4710

Previously, when the Max CSV collections attribute was set to a low value in NexJ System Admin Console on the Statistics page for export settings for reports, and you created a report with collection fields, and exported the report to CSV format, some collection fields were not exported. This issue has been resolved.

CDM-4711

Previously, associated collections that were two levels deep were not successfully exported to the CSV format. This issue has been resolved.

ECRM-31182

Previously, you were unable to a post a review in NexJ Studio after ReviewBoard was updated to use HTTPS. This issue has been resolved.

ECRM-31262

An issue where errors were being thrown when attempting to execute threading statistics from NexJ System Admin Console has been resolved.

ECRM-31354

Previously, if you had a logger that was configured through properties setup, and it had not been used to log an event, it would not show up in the run-time logging configuration as expected. This issue has been resolved.

ECRM-31357

An issue where a client certificate was being requested during CORS preflight requests has been resolved.

Version 22.01

AFL-4028

Previously, when you logged into NexJ CRM, changed the email address in NexJ Admin Console for the logged-in user, and then emailed a contact in the **Activities** tab on the Contacts workspace, the email prompt dialog displayed the old email address even though the email was sent to the new email address. This issue has been resolved.

AFL-6901

Previously, when you used the navigator on mobile platforms, a number indicator was added to the **Filter options** button to indicate if filter fields were being hidden. If a nested dialog was encountered when attempting to choose a filter field, there was no indicator on the nested **Filter options** button that filter fields were hidden. This issue has been resolved.

AFL-6944

Previously, an unexpected error was thrown when updating the attributes for a new Person instance that had yet to be committed. This issue has been resolved.

AFL-7017

Previously, when you clicked on a contact's name on the Contacts workspace to open their detail page, selected the **Summary**, **Detail**, and **Calendar** tabs, and then reselected the **Summary** and **Detail** tabs, the scroll bar disappeared. This issue has been resolved.

AFL-7052

Previously, when you scheduled a number of Proactive or Review touches on the Contacts workspace, selected the **SLM Touches Report** menu option, selected **Proactive Touch** or **Review** in the **Touch Types** field in the Specify Report Parameters dialog, selected **Range**, entered the required start and end dates, selected **Show Interactions** and/or **Show the full note for each interaction**, and ran the report, the application threw an unexpected error. This issue has been resolved.

ECRM-31086

Previously, when the Act'upgradeLightParticipants event was run as a Batch Broker process it was not showing the log. This issue has been resolved.

Version 21.12.1.0

CDM-4556

Previously, a report with multiple filters added for the same associated collection could return unexpected results, incorrectly selecting data that did not fully match the configured criteria. Under specific conditions, the logical "OR" operator was applied to the filter conditions as opposed to the logical "AND" operator, as was designed. This issue has been resolved.

CDM-4588

Previously, when an "equals" filter was used against a numeric attribute, such as "Deal Open Days", the value configured in the filter might not be visible in the **About** tab, however the filter criteria was still correctly applied when the report was executed. This issue has been resolved.

ECRM-31181

Previously, when you opened Main.upgrade in the finance project, and clicked the **Add** + button to add a new upgrade step, the new upgrade step did not appear at the top of the list, and was not automatically selected. This issue has been resolved.

Version 21.12

AFL-3611

Act template names with "follow up" have been renamed with hyphenated names for consistency. If act template names have been denormalized anywhere in client projects, these names should also be updated as part of an upgrade.

AFL-4111

A layout and indentation issue has been fixed in the Specify Report Parameters dialog.

AFL-5874

Previously, adding a new contact as part of selecting participants for a task could result in the Contacts filter card on the Contacts workspace showing as edited (for example, a trailing asterisk displayed on the Contacts filter card caption). This issue has been resolved.

AFL-6172

Previously, when you launched the Export dialog from any table view with export to CSV configured, changed the default section from "Visible Columns" to "All Columns," and clicked **Cancel**, a warning message displayed concerning discarding unsaved information instead of the dialog closing as expected. This issue has been resolved.

AFL-6583

A filtering issue, where unexpected results were being returned after specifying multiple values linked to an associated collection, has been resolved.

AFL-6659

Previously, users were able to view or edit targeted activity plans templates when they didn't have the right privilege. These issues have been resolved.

AFL-6688

Previously, when you had selected a matched contact on the Review Match Results page on the Import workspace, you were unable to clear the checkbox for the matched contact. This issue has been resolved.

AFL-6693

Previously, the ability to filter SLM Touches reports by a range was missing. This issue has been resolved.

AFL-6713

When you navigate to the Tasks workspace, create a task with 32,768 characters or more in the **Notes** field, and generate a Task report in Excel format, the **Notes** field will only display up to a maximum of 32,767 characters (limitation of .xls format). If a task note exceeds 32,767, the field will be truncated (only the first 32,764 characters will be displayed followed by ...).

AFL-6725

Previously, the date and time calendar for the Start Time or End Time filters on the Import workspace did not return the correct results. This issue has been resolved.

AFL-6778

An issue where non-default filter chips having a default value remained after resetting a navigator filter has been resolved.

AFL-6806

For mobile devices, when the browser width was less than 768 pixels, the option menu for opportunities, service requests, and leads did not display. This issue has been resolved.

AFL-6815

End users will not see system users when using NexJ CRM.

AFL-6834

When you attempted to perform repeat edits with a nested dialog, changes applied in the prior opening of the nested dialog did not persist when the nested dialog was reopened before committing the parent dialog. This issue has been resolved.

AFL-6838

The template name was missing from the confirmation prompt that appears when you delete an email in the **Activities** tab on the Contacts workspace. This issue has been resolved.

AFL-6870

Previously, the Service Level Management last touch date was not set properly for imported data. This issue has been resolved.

> ⚠ The resolution to this issue won't fix data imported prior to this fix. It will only impact data imported after this fix has been applied.

AFL-6881

Previously, a business admin user was able to see the Leads workspace in NexJ CRM deployed in a Cloud environment. This issue has been resolved.

AFL-6948

Previously, you could not filter activities using the Open Status. For example, you could not filter tasks on the Tasks workspace using the Open status. This issue has been resolved.

AFL-6956

Previously, a user was able to see participants for campaigns in the **Participants** tab who were marked as not visible, and for whom he did not have access. This issue has been resolved.

AFL-6962

An issue where the MDA rich-text control was editable in read-only mode has been resolved.

AFL-6963

The tab order on the Customize workspace has been changed so that the tabs display in alphabetical order.

CDM-4513

Previously, the " datetime " picker was used for " date " attributes in ad hoc reporting filters. It was necessary to specify the "time" component even though it was not applicable and prevented certain reporting use-cases from being possible. This issue has been resolved.

CDM-4514

On rare occasions, some filter parameters previously added to a report were not visible when the report was edited. This issue has been resolved.

ECRM-30685

Previously, the SLM Touches report caused an issue if the report was put into a queue before running it. This issue has been fixed.

ECRM-30971

An issue that could result in recovery operations excessively consuming pooling resources has been resolved.

ECRM-31092

A Mercurial certificate issue that resulted in errors being shown in NexJ Studio has been resolved.

INFORM-137

Previously, if you did not enable access to the Inform feature for your system administrator user ID, you might see the following error message in the log on startup: nexj.core.runtime.SecurityViolationException: Access to event "read" of class "inform:Tenant" denied due to missing privilege "inform:FeedView". This issue has been resolved.

INFORM-147

Previously, if you customized the caption property on the Contact portal, end users might experience issues accessing NexJ CRM though the default URL <root>/nexj/ui/portal. The NexJ Inform Admin workspace might be displayed when users attempted to log into NexJ CRM. This issue has been resolved.

AFL-2965

Edit toolbar buttons have been added to the mobile UI for entities and schedule items.

AFL-3981

An issue with NexJ CRM not permitting filtering on other users on the Tasks workspace is resolved.

> ⚠ Only users without the "mda:PrivateSchedulesTasksEnable" privilege are allowed to view other users' tasks.

AFL-4376

An issue that meant when you created a filter chip on the Contacts workspace for a new custom field, and deleted the custom field on the Customize workspace, the filter chip was not removed without refreshing the UI has been resolved.

AFL-6078

Previously, when you removed the coverage for an entity you triggered unintended notifications if you were using the Hierarchical Access Model. This issue has been resolved.

AFL-6269

Previously, when you selected the **Current Service Request List** radio button in the Specify Report Parameters dialog for a Service Request Detail Report, all service requests were included in the report instead of only the service requests that were specified by the filter results or saved list that was active when you chose to run the report. This issue has been resolved.

AFL-6362

Previously, when you tried to open or edit emails displayed in the **Activities** tab for a contact a system error was sometimes generated. This issue has been resolved.

AFL-6371

The **Add Attachment** field has been disabled for private documents on the Document Manager workspace.

AFL-6389

You can now search and filter for opportunities in the **Opportunities** tab on the Campaigns workspace.

AFL-6408

Previously, a system error was generated when you attempted to add 10 or more users for delegate schedule access in the Set Permissions dialog on the Schedule workspace. This issue has been resolved.

AFL-6579

Previously, if you changed the operator for a filter chip on the Contacts workspace from "equals" to "start with," and provided a value, an error was generated. This issue has been resolved.

AFL-6596

Previously, when a portlet name was long enough that the caption text wrapped to another line, the lower line had a partial strike-through created by a horizontal rule separator. This issue has been resolved.

AFL-6628

An issue that meant when you tried to delete a task the delete prompt displayed along with an error message has been resolved.

AFL-6631

Previously, you were unable to edit steps for an assigned activity plan while creating a copy of its template on the Customize workspace. This issue has been resolved.

AFL-6704

Previously, you were unable to edit activity plans from the Activities card for a contact. This issue has been resolved.

AFL-6766

An issue where a mismatched dialog displayed upon adding a new filter chip has been resolved.

CDM-4458

Previously, and in an environment with a dedicated Reporting server, assigning or removing Reporting-related privileges for NexJ CRM users in NexJ Admin Console did not take effect until the Reporting server was restarted. This issue has been resolved.

CDM-4472

Previously, in an environment where a dedicated Reporting server was deployed, and a change was made in NexJ CRM that required updating any of the calculated attributes configured for reporting (such as a "Full Name" for Contact), and if the Reporting server was not running, the values of the affected calculated attributes were not updated. This issue has been resolved.

ECRM-30619

The dialog behavior when you use the Schedule workspace to edit a meeting created in Microsoft Outlook is now consistent, offering you the following two options:

- Email all attendees
- Do not email attendees

ECRM-31027

An issue that meant that a user without lead privileges could access the **Leads** subtab on the Contacts workspace in the classic UI has been resolved.

ECRM-31039

An issue that caused a failure to occur with a "Token issued in the future" message when you used OAuth Authentication has been resolved.

ECRM-30719

An OAuth authentication issue that caused inactive NexJ CRM user sessions to time out after approximately 10 minutes has been resolved.

Version 9.9.1.0

AFL-6692

An issue that caused Next Touch dates to not be properly generated between 12 AM and 4 AM EST has been resolved.

AFL-6711

Previously, when you imported contact data to NexJ CRM, last touch dates for completed activities were incorrectly set to the current time of the import, which impacted the Service Level Management functionality. This issue has been resolved.

Version 9.9.0.0

AFL-6141

A null pointer exception thrown at application startup due to an invalid filter metadata configuration has been resolved.

AFL-6381

An issue that meant you could perform campaign manager tasks when you were not a campaign manager has been resolved.

AFL-6410

An issue where the caption for the Period filter chip on the Service Level Management workspace was showing incorrectly has been resolved.

AFL-6416

An issue that meant that the Date of Birth filter returned incorrect results for the "in the previous (days)" operator for a value greater than 466 days has been resolved.

AFL-6427

When you have access to households in NexJ CRM, and you add columns to the data table on the Contacts workspace, the new columns now consistently display to the right of the fixed columns such as Icon and Name.

AFL-6463

Private schedule items are now more readily viewed on the Schedule workspace.

AFL-6472

An issue that meant that the Participants by status chart for campaigns didn't display all of the participant statuses has been resolved.

AFL-6675

Previously, when you edited an activity plan and attempted to save your changes, a long-running query was generated with a timeout error. This issue has been resolved.

ECRM-30619

An issue that affected meetings created in Microsoft Outlook and containing participants external to NexJ CRM has been corrected. Previously, if these meetings had meeting invitations enabled, then updating them from within NexJ CRM did not provide users the choice of whether to email attendees. That option is now offered.

ECRM-30666

System users such as nexjsa, Keycloak:admin, push, and authenticated_user no longer display in the user selection dialog.

ECRM-30841

Previously, when you opened `Person.filter` in NexJ Studio, selected the "PSN" subject area, the **Filters** tab, and the "ALL_PSN" filter, you were unable to edit the privilege bound to the filter or the icon associated with the filter. This issue has been resolved.

ECRM-30905

An issue that meant that the **Problems** tab in NexJ Studio did not display a model error when a filter field attribute was defined for a subclass that did not have a specified case has been resolved.

ECRM-30951

Previously, if a new plugin was built with a new `ssl.keystore` (`%PLUGIN_HOME%\enterprise\etc\config\teee`), and your deploy folder (`.teee`) already existed, the new `ssl.keystore` was not copied over until the folder was deleted, or you manually copied over the new file. This issue has been resolved so that a new plugin with an updated `ssl.keystore` redeploys the new keystore.

ECRM-30952

An issue that meant that you were unable to use properties file variables for certificate or keystore files has been resolved.

Version 9.8.0.0

AFL-2634

Previously, when you created a private category on the Customize workspace, added this category to a contact, logged in as another user, and selected the **Detail** tab for the same contact, the **Delete** button for the category was available on the Categories card instead of being disabled. This issue has been resolved.

AFL-3320

Process Management forms no longer display with double scroll bars when you are using Microsoft Internet Explorer.

AFL-3870

An issue that meant that a user was unexpectedly able to type or paste more than 2000 characters into a reply to a conversation has been resolved.

AFL-5089

As issue that meant that the data tables displayed the wrong count of items when the parent and child associations were of the same class has been resolved.

AFL-5402

An issue that meant that the French enum filter caption had a duplicate header has been resolved.

AFL-5920

Previously, if you attempted to include a table as part of sending batch emails, recipients having a Gmail account saw distorted table data. This issue has been resolved.

AFL-5859

The load indicator now extends to the full width of all dialogs.

AFL-5929

Using the "not equals" operator to filter a collection of records now gives results as expected.

AFL-6004

Previously, when you created a new activity plan in the **Activity Plans** tab on the Customize workspace, added a new step, selected **Related Entity** in the For section, and clicked **Add** in the **Related entity** field, the Select a custom field type dialog appeared instead of the Select related entity dialog. This issue has been resolved.

AFL-6059

An issue that meant that a filter chip dialog could become unresponsive after attempting to select more than 1000 items has been resolved.

AFL-6084

You can now add activity plans for a contact from the **Activities** card in the **Summary** tab and the **Activities** tab.

AFL-6140

An issue where an error occurred when launching a dialog containing a reference to a filter-enabled picker has been resolved.

AFL-6149

Export log tasks no longer show up without a standing status. Instead, they show up with a completed status.

AFL-6279

Previously, tasks with the same due date on the **My Tasks** card in the **Summary** tab on the Home workspace were sorted in a random order instead of being grouped by due date, and then sorted by due date and then start date. This issue has been resolved.

AFL-6298

An issue where the dynamic caption portion of a default filter chip showed as blank has been resolved.

AFL-6312

Previously, when you navigated to the Contacts workspace, added the Category filter field with the not equals operator enabled, selected a category and applied the filter, the not equal operator was ignored for contacts who had multiple categories, and the data table displayed the wrong list of contacts. This issue has been resolved.

ECRM-29013

In the NexJ Studio Presentation layer, the controls shown for a layout in the **Layout** tab now automatically display in the Outline view.

ECRM-29481

As issue that meant that NexJ Studio didn't display the required template file for selection when recreating databases has been resolved.

ECRM-29922

An issue that meant that the wrong finance mixin was picked up in the financereport project if the last mixin came from a different finance branch has been resolved.

ECRM-30122

An issue that mean when you clicked the **Notifications** button in the application toolbar an unexpected error was thrown has been resolved.

ECRM-30379

Previously, when a calculated attribute referenced an associated attribute with a class configured for instance or class caching, the query generator read instances from the cache instead of the database, which caused problems when the association was a collection, as the generated query was non-performant. This issue has been resolved.

ECRM-30445

The default readTimeout has been increased to 30 seconds for SMTP mail channels.

ECRM-30607

An issue where the requestTimeout parameter on a Kafka channel was being ignored has been resolved.

ECRM-30697

An issue where intermittent integration exceptions occurred for HTTP connections configured with proactive authentication has been resolved.

ECRM-30724

The NexJ-Logout-Date cookie is now set just once with the correct Samesite attribute.

Version 9.7.0.0

AFL-2678

The ability to select a year in date-type fields is supported for iOS devices.

AFL-3075

Previously, when you tried to run a contact report on an iOS device, an error displayed and the report was not generated. This issue has been resolved.

AFL-4729

An issue that meant when you used an iPhone, you were unable to paste text into the rich text editor, such as when sending a batch email, has been resolved.

AFL-4919

An issue that threw an invalid query exception when two users attempted to modify the same field for the same household or company has been resolved.

AFL-5158

The right-click menu for Schedule workspace items has been made available for mobile devices.

AFL-5205

An issue that meant when you attempted to create a schedule item on a mobile device that was running Chrome, you were possibly unable to set the start date has been resolved.

AFL-5252

An issue where all-day inbound meetings synchronized from Microsoft Exchange were displayed as spanning two days in NexJ CRM has been resolved.

AFL-5501

Previously, when a delegate created a schedule item on someone else's calendar, the **Assign to** field incorrectly defaulted to the delegate's name when the delegate used the drag-and-drop functionality to create a schedule item on their own calendar, and then created a schedule item on someone else's calendar, while leaving their own calendar open. This issue has been resolved.

AFL-5630

Previously, if a text-based filter chip used the `equals` operator with multiple values, and you changed it to use the `contains` operator, you received an error. This issue has been resolved.

AFL-5643

Previously, the **Date** filter chip on detail pages for NexJ CRM workspaces did not respect a user's local time zone. This issue has been resolved.

AFL-5653

An issue that threw a uniqueness constraint error when you created a list on the Filters and lists page, modified its name, and then attempted to create a new list with the original name, has been resolved.

AFL-5659

Previously, any integer-driven fields linked to the application banner displayed only non-zero values. Field values of zero appeared as empty in the banner. This issue has been resolved.

AFL-5697

Previously, the **equals today** operator for the **Date** filter chip on detail pages for NexJ CRM workspaces was based on the Coordinated Universal Time (UTC) standard and did not account for a user's local time zone. This issue has been resolved.

AFL-5723

Previously, when a call to open a dialog had isEdit specified as false, multipicker fields failed to populate. This issue has been resolved.

AFL-5734

Previously, when you selected two currency values for a currency field filter on the Opportunities workspace when currency conversion was enabled an unexpected error was thrown. This issue has been resolved.

AFL-5745

An issue that caused the UI to freeze on the Schedule workspace has been resolved.

AFL-5771

An issue where having three or more menus linked to the tools of a UI table caused a client-side error has been resolved.

AFL-5818

An issue where the caption for an enumeration picker was being derived from the enumeration name instead of the corresponding enumeration caption has been resolved.

AFL-5824

Previously, when you used Mozilla Firefox, frozen columns in data tables displayed at the rightmost side instead of the leftmost side of the tables. This column ordering issue has been resolved.

AFL-5858

Previously, the load indicator did not display when you clicked a button that was available from the floating action button or clicked the **Add** button in a multiple selection dialog. This issue has been resolved.

AFL-5875

An issue where a multiple selection dialog with a required field could block subsequent submission of selections has been resolved.

AFL-6029

An issue where the filter card asterisk, which indicates that the filter has been modified, would remain even after you reset the filter card has been resolved.

AFL-6030

An issue that meant that you were unable to add steps when creating a new activity plan has been resolved.

AFL-6085

An issue that threw an unexpected error in the **Conversations** tab when navigating between different contacts has been resolved.

ECRM-28988

An issue that occurred because users were not prevented from deleting entity lists created by batch processes has been resolved.

ECRM-30038

An issue that meant that the ElementPosition linter rule did not ignore changes merged from Finance has been resolved.

ECRM-30196

Previously, the icon picker in NexJ Studio didn't work. This issue has been resolved.

ECRM-30238

An issue that meant that you could open an uncustomized filter file in the Presentation application layer in NexJ Studio, select **Fields > Appearance**, and select or clear **Persistent** has been resolved.

ECRM-30261

An issue that meant that the validation failed for metadata resource flags has been resolved.

ECRM-30264

Previously, when an administrator reactivated a user's Exchange synchronization links, the initial interaction updates from that reactivation were linked to the administrator rather than the user whose links they were. This issue has been resolved.

ECRM-30294

A non-functional issue with streaming notifications for Microsoft Exchange that resulted in numerous integration exceptions being written daily to the logs has been resolved.

ECRM-30308

An issue that meant that when the server launched it did not warn you that the folder mixin was not usable with current plugin has been resolved.

ECRM-30367

An issue that meant that validation exceptions on the JSON/REST server threw error codes with a 500 HTTP response status has been resolved.

ECRM-30383

To avoid excessive lazy load during recurrence expansion, clients can now customize the `SCHEDULE_ITEM_RECURRENCE_PATTERN.ATTRIBUTES_TO_PRELOAD_FOR_RECURRENCE` attribute to include `existingOccurrence` attributes referenced during the recurrence expansion.

ECRM-30385

Previously, when a user changed the "name" of an AddressType in NexJ Admin Console, and the `type` attribute for the `Address` class had `updateAudit=true`, a lazy load occurred that loaded all `Address` objects of that type. This issue has been resolved.

ECRM-30412

An issue that caused the **Calendar** field in Contact Search to become unresponsive has been resolved.

ECRM-30420

A feature where some authentication protocols would previously allow integration channel receivers set up for basic authentication to use container authentication is no longer supported. Instead, if container authentication is required for the HTTP channel receiver, then you must change the channel authentication from "basic" to "container."

ECRM-30456

Updates have been made to the query optimizer to improve the performance of queries involving the QueuedProcessEntity table, specifically those queries that include an OR operation of several OID values.

ECRM-30492

An issue that meant that you could not delete an individual contact created from a coverage group on the Contacts workspace has been resolved.

ECRM-30545

An issue that caused a partial display of `.extreport` files in NexJ Studio has been resolved.

ECRM-30620

An issue that caused a "401 - Please authenticate error" after some elapsed period while using the system has been resolved.

Version 9.6.1.0

AFL-5651

An issue that caused you to receive an unexpected error if you sorted your activity items by due date has been resolved.

AFL-5660

Previously, charts that used a CustomView with `type=mda:Gauge` did not display correctly. This issue has been resolved.

AFL-5728

Previously, when you logged into NexJ CRM, and tried to create a schedule item, the linear progress indicator did not always complete after loading NexJ CRM, which meant all of the commit buttons remained disabled. This issue has been resolved.

AFL-5739

As issue that caused the performance banner to be unresponsive when a dialog was opened or fields were modified has been resolved.

AFL-5774

An issue where some remote logging messages from the 9.X UI triggered null pointer exceptions has been resolved.

CDM-3986

An issue that meant that incorrect data was displayed in column stacked charts with multiple y-axes has been resolved.

CDM-4041

An issue that caused duplication of the For and Owner subtitles in the preview data tables for visualizations has been resolved.

CDM-4326

An issue that meant that when you created filters for reports that used associations the filtered results could be inaccurate has been resolved.

CDM-4337

Previously, when a month was used as a grouping function for a report, and the report was exported to XLSX, PDF, or HTML, the month names included in the exported file were not always accurate. This issue has been resolved.

ECRM-30351

Previously, when you modified a task on the Tasks workspace by removing a user from the **Assign To** field, and selecting the same user in the **Assign To** field, and you attempted to save the task, you received a "Task violates a uniqueness constraint" error. This issue has been resolved.

Version 9.6.0.0

AFL-3723, AFL-3942

The rendering of dates in NexJ CRM, including those in activity audit trails and notifications, has been improved to more reliably display according to the locale specified by the user's browser language.

AFL-5391

When the available screen space for a data table become too narrow to show all of the columns, the responsive design of the UI allows the data to instead display as a list. However, previous to this release, it was possible for the data display in a multi-column card to change from a table to a list, but then not change back. With this release, the behavior has been corrected, and the display of the data can move properly between the two display styles as the available screen space changes.

AFL-5444

An issue has been fixed that caused half-hour meetings to display only the description information when viewed in the Schedule workspace.

AFL-5454

The North American area code 672 is now recognized as valid by the CRM system.

AFL-5488

Previously, when a filter card made use of an Assign To picker, and when a user opened the control, it occasionally was empty. This issue has been resolved.

AFL-5497

An issue that caused inline frames to reload, leading to performance issues, has been fixed.

AFL-5498

Users configured with Exchange Synchronization and who add another user to the **Assign To** field of a meeting no longer receive unexpected errors when they send the invitation.

AFL-5511

Previously, when you navigated to the Contacts workspace, clicked on **Manage filters and lists**, added a list, refreshed your browser, and repeated the procedure, the dialog layout for the **OK** and **Cancel** buttons changed each time you refreshed your browser. This issue has been resolved.

AFL-5544

An issue has been fixed that allowed users to reach a situation in which no CRM data would load until an administrator reset their client state.

AFL-5582

An issue that caused an unexpected error when you navigated to the Schedule workspace, created a meeting, and navigated to other workspaces without performing any additional actions, has been resolved.

AFL-5587

Previously, when you selected the Start Date or Due Date filter chips, selected the between operator, and entered the upper and lower bound dates, the results only showed up to the upper bound date minus 1 day. This issue has been resolved.

AFL-5598

When you select **Show Activities from Children** on the Activities tab for a company or household, those activities are now also reflected in the Activities by Type chart on the Summary tab.

AFL-5629

An issue has been fixed in which access-restricted properties (hidden from a user's view) caused errors when the user attempted to update other fields.

AFL-5679

A filter issue in which the indeterminate data load progress indicator would display indefinitely, potentially blocking subsequent operations, has been fixed.

CDM-3944

An issue has been fixed that made it difficult to enter data into the **Name** field for new reports.

CDM-4039

You are now able to sort the data in the Reports workspace by Subject Area or by Creator as expected.

CDM-4043

An issue has been fixed in which, in rare cases, emails sent out by a scheduled run of a report did not always have the details of the report attached in a .csv file.

CDM-4137

The **Clear Filters** button is now active when you first navigate to the Filters tab of the report builder.

CDM-4159

If you make changes to a scheduled report, those changes are now emailed to its recipients according to the specified schedule. Previously, copies of the report would also be created and emailed whenever changes to the report were saved.

CDM-4312

The Probability filter field in the Deals report now interprets the value you enter as a percent value from 0 to 100. Previously, it interpreted the value of a pure probability value between 0 and 1.

CDM-4314

The rendering of reports to PDF has been improved so that long descriptions no longer run off the page.

ECRM-30009

An issue in the classic UI in which a maximized task popup resized itself if you added an attachment has been fixed.

ECRM-30114

The Exchange Synch subscription error count now resets correctly when disabling links.

ECRM-30124

An inbound synch behavior that could lead to a high number of messages on the ExchangeServiceQueueExchangeServiceQueue has been improved to reduce queue size.

ECRM-30125

A fix has been introduced to reduce the frequency of OptimisticLockException errors related to the use of ExchangeSubscription during streaming.

ECRM-30126

An issue has been fixed that could trigger a high volume of err.sync.outboundServiceProtocolError errors due to use of an invalid XML element during outbound contact synchronization.

ECRM-30213

The algorithm used to parse Exchange Sync messages has been updated in order to distinguish cases of a double-space being used as a delimiter from cases of a double-space forming part of the body of a message. This change stops streaming connections from triggering large numbers of false unexpected error.

Version 9.5.0.0

AFL-2711

A user's ability to make selections in the Security tab for acts (such as schedule items) now properly reflects the value of the **Enable editing the security for instances of this template** option in the specific act's templates.

AFL-2999

When you change the activity template associated with a task, the **Status** drop-down in the New Task or Edit Task dialog no longer continues to display the statuses applicable to the previous activity template.

AFL-3058

On the Document Manager workspace, documents no longer appear to have unclickable hyperlinks.

AFL-3282

When you try to delete a product from a parent opportunity or a product opportunity, the confirmation message is now clearer.

AFL-3556

In the **Stages** tab of the Edit Opportunity Template dialog, the **Edit** button is no longer enabled for users without the correct permissions.

AFL-3742

The **View Access** tab in the Set Permissions dialog on the Schedule workspace now includes assistive text to guide users through the use of the page.

AFL-4221

You can now add a user to a contact's coverage more than once with the same coverage role.

AFL-4419

When you select an entity and create a new list to add the entity to, the **Type** drop-down in the New List dialog no longer includes irrelevant list types.

AFL-5041

The vertical height of the entity banner is now updated immediately when corresponding new data is added.

AFL-5105

Switching quickly between filters no longer results in the display of data from unselected filters.

AFL-5132

An issue affecting migration from NexJ CRM 9.2 to later versions has been addressed. The issue only affected deployments using Oracle as their database, and caused a database reseed failure.

AFL-5207

Contact information updated through the Addresses card of the Detail tab now propagates as expected to the entity banner.

AFL-5285

This fix reintroduces the ability to view departments in the hierarchy information for a contact.

> Note
>
> Even though you are able to view the departments within this information, you are unable to navigate to them.

.

AFL-5295

An issue that sometimes caused the Delegated Task Report to time out has been fixed.

AFL-5352

An issue that caused repeated error notifications when a user had more than 4096 alarms in their queue has been resolved.

AFL-5361

The queries used to fetch the data for the Schedule workspace week and month views has been updated in order to reduce the number of binds required, and improve overall performance.

AFL-5379

An unneeded dependency on nexj/ui/portal present in the afl-mda project, and affecting all metadata portlets, has been removed. Previously, this dependency statement made it impossible to deploy a remote portlet without also deploying a copy of the portal server.

AFL-5404

The performance of the Service Request workspace's data table was improved by removing a hidden column (Assign To).

AFL-5411

An issue has been fixed, which caused API calls to a subclass to run as if the API for the parent class had been called. Schema inheritance from a parent class is now supported, which means that an API resource can inherit a schema without further schema configuration if the parent class already has a schema definition. This minimizes configurations for subclasses when a schema definition already exists for the parent class.

AFL-5417

An issue has been fixed that caused workspaces connected to Jasper Server to reset while users navigated to other areas of the product.

AFL-5473

The Notification sidebar has been widened slightly in order to eliminate an overlap of the notification's time stamp and the **Mark as Read** button.

AFL-5489

Previously, the banner back button erroneously displayed upon return from another workspace that was initially launched from the navigator using a custom script. This issue has been resolved.

AFL-5492

An issue that sometimes caused the captions on default filter fields to fail to render properly has been fixed.

CDM-3372

An issue that caused a Mozilla Firefox browser error, when a user navigated to the Reports workspace, has been resolved.

CDM-3988

An issue has been fixed, which had caused the Reporting workspace to repeatedly recreate itself and generate unneeded network traffic.

CDM-4029

An issue that sometimes caused errors when updating report-related cards in dashboards has been resolved.

CDM-4031

You can now successfully use the Specified/Unspecified search option on the description field when generating reports. Previously, this field was effectively ignored when set to Specified, and blocked all results when set to Unspecified.

> ⚠ This fix will only affects reports that have been created or edited after updating 9.5.0.0. If you have an older report that makes use of this criterion, you should open it, edit it, and resave it.

CDM-4032

An issue that sometimes stopped data from loading in the My Reports tab of the Reports workspace had been resolved.

CDM-4136

Report summaries and dashboard with empty result sets can now be exported.

CPM-696

When a Process Management form has a checkbox that must be selected to proceed, its state is now properly validated.

ECRM-28243

The `relamless` flag in the getUniqueName event of the user.meta class has been replaced with the authNaming property. This completes the replacement of the `relamless` flag across the product, which began in Version 8.9. You should notice no change to behavior due to this update.

ECRM-28692

The Generate Upgrade Steps tool now correctly identifies and generates upgrade steps for models that make use of augments.

ECRM-29893

The Database Schema Tool in NexJ Studio no longer generates mismatched versions and namespaces in SQL upgrade scripts for mixin data source

ECRM-29939

The generation of schemas for use in data integration using Avro messages is now consistent in its use of namespaces. This enables easier preregistration of Avro schemas if required for use with NexJ Data Bridge.

ECRM-30033

An issue that caused validation errors to trigger server error 50e0 rather than just displaying the validation error text has been corrected.

ECRM-30042

Changes have been made to reduce or eliminate the likelihood of processing errors if a reminder dialog is left open for a significant period of time (10+ minutes) before being dismissed.

Version 9.4.0.2

AFL-5194

An issue that meant that you could not navigate to an instance from a link in a JasperReports Server report has been resolved.

AFL-5406

Previously, when you added an event to a top level tool in the portal metadata, and defined the corresponding UIAction in a Broker portlet, the event was not fired. This issue has been resolved.

Version 9.4.1.0

CDM-3842

Previously, when you clicked the **Share Report** button , an empty notification message was displayed. This issue has been resolved.

CDM-3867

Previously, you were unable to use the Aging Open Deals ad hoc report in a dashboard. This issue has been resolved.

CDM-3925

Previously, when you created a new Deals report, selected the **Visualization** tab, cleared **Add Grouping**, clicked **Add Y-Axis**,and selected **Count of All Deals**, the related data did not display in the chart. This issue has been resolved.

CDM-3931

Previously, when you edited an ad hoc report you could not modify filters that used operators. This issue has been resolved.

CDM-3984

Previously, and during a reseed, a null pointer exception was caused by disabling a subject area (enabled="false") using a reporting augment. This issue has been resolved.

Version 9.4.0.1

ECRM-30012

An issue that caused a checksum mismatch after you started a 9.X build, deployed using IBM WebSphere, has been resolved.

Version 9.4.0.0

AFL-3254

Previously, the buttons width exceeded the warning dialog width when you deleted a meeting with multiple **Assign To** users in another user's calendar on the Schedule workspace, edited or deleted a recurring schedule item in another user's calendar, or added a user coverage group to a contact in the **Detail** tab. This issue has been resolved.

AFL-3544

An issue that meant that you could not add and edit notes and resolution comments for service requests in the **Detail** tab has been resolved.

AFL-4368

Previously, when you had a filter chip with a custom field enabled on the Contacts workspace, and you created a new custom field from a contact's **Detail** tab (with a different name than the existing custom field), added it to the contact, and navigated back to the Contacts data table, the new filter chip displayed the pre-existing custom field's name. This issue has been resolved.

AFL-4718

An issue that caused the **Show available actions** floating action button for performance statistics not to work for independent dialogs has been resolved.

AFL-4739

An issue that meant when you accessed a contact’s record from a direct link or a third-party application, the default contact for a task or schedule item was not set appropriately has been resolved.

AFL-4799

Previously, when you opened a New Interaction dialog, opened the Select entities dialog from the **For** field, selected the Companies filter, searched for and added a company, closed the Select entities dialog and reopened it, your search was not reset. This issue has been resolved.

AFL-4802

Previously, when you navigated to any workspace with filters, clicked the **Filter options** button , selected the **Add filter fields** menu option, selected **Unselect all** to clear filter field selections, entered search criteria in the **Search by filter** field, and selected **Select All**, all of the options were selected instead of only the filtered results. This issue has been resolved.

AFL-4824

Previously, on the Contacts workspace, when you filtered entity data using the State filter chip you received unexpected and inconsistent results. This issue has been resolved.

AFL-4829

An issue that meant that you could not double-click on a row in the data table on the Tasks workspace to open the Edit dialog has been resolved.

AFL-4845

Previously, when you used the text name search in the **Assign To** field for a task, the search used a prefix search to return values that started with certain letters instead of a search that found values that contained certain letters. This issue has been resolved.

AFL-4847

An issue that meant when you used Safari on iOS, two taps were required when attempting to use a hyperlink within a data table has been resolved. For touch-enabled devices, the row toolbar for data tables has been reduced to include one **More Actions** button on each row, where you can select options.

AFL-4852

Previously, when you had multiple alarms displaying in a Reminders dialog, you changed the snooze settings for the alarms, and clicked the **Snooze** button for one alarm, all alarms reverted back to their default settings. This issue has been resolved.

AFL-4884

An issue that meant when you used the Country filter chip on the Contacts workspace, the list of countries was not sorted alphabetically has been resolved.

AFL-4933

Previously, when you navigated to the Contacts workspace, selected multiple contacts, clicked the **More Actions** button , and selected **Update > Custom Field** to perform a batch update on a currency **Custom Field**, you were not allowed to input a value. This issue has been resolved.

AFL-4948

An issue that meant when the Hierarchical Access Model was enabled, you were unable to filter using a division, subfirm, or branch has been resolved.

AFL-4949

Previously, you were unable to filter contacts using User Fields filter chips. This issue has been resolved.

AFL-4974

An issue that meant that you were not successfully directed to another tab within the same workspace because a UI event was not invoked has been resolved.

AFL-5030

An issue that meant that links for names on the Customize workspace were not clickable has been resolved.

AFL-5043

An issue that meant your client session was not cleared when you closed your browser has been resolved.

AFL-5064

An issue reading parameters in the range input control has been resolved.

AFL-5073

An issue that meant that the Classification permission field was missing when email was saved from Microsoft Outlook, and when the user opened it in NexJ CRM, has been resolved.

AFL-5088

An issue that caused the visibility of some menu items to not dynamically update when conditions changed has been resolved.

AFL-5163

Previously, when you added a custom field for a selected contact in the **Detail** tab on the Contacts workspace, and clicked on an entity name in the Select an entity dialog to select it, the selection in the dialog was not highlighted as expected. This issue has been resolved.

CDM-3338

An issue that meant that when an environment's database schema was recreated and deployed with the bireport flag enabled (`meta.bireport.enabled=true` in the development environment file), and then re-deployed with the bireport flag disabled, the server generated an error in the finance instance console, has been resolved.

CDM-3379

An issue that meant that on the Reports workspace, if you created a report, clicked on the **Select** button + to add a field, selected any checkbox, and used the keyboard to add any character, the **Add Fields** typeahead field on the parent window was still accessible even though a child dialog was open, has been resolved.

CPM-490

An issue where an entity to which a user did not have access was being pre-populated, has been resolved. While the dialog shows entities that the user cannot see, when the dialog opens, the entity that the user cannot see will not be displayed. The selected count will show as **1 selected**, but there will be no checkmark on any of the entities as the selected entity is hidden in the dialog.

CPM-634

An issue that meant that when you used Process Management forms, and a MM picker value was calculated using the value formula from another field, the user interface would not refresh has been resolved.

ECRM-27843

An issue with the Apache Avro message formatter where messages namespaced by colons would generate errors has been resolved.

ECRM-29621

An issue that caused a Recurrence.testSeriesRangeUI unit test failure related to the Daylight Savings Time change period has been resolved.

ECRM-29660

An issue in which errors in recovering messages led to a semaphore leak, and performance degradation, has been fixed.

ECRM-29701

The use of the space character is now supported when you use Windows batch scripts to specify the JAVA_HOME path for the Push Redirector.

ECRM-29759

Issues caused by changes included with Google Chrome version 80 and later, and that prevent the user state from being saved as intended when the user closes or navigates away from a particular page, have been resolved.

ECRM-29774

An issue that caused Apache Ant calls failure for `build.xml` during deployment for the `websphere.config` target, when you are using Java 1.8, has been resolved.

ECRM-29783

Default SMTP timeouts including connectionTimeout, readTimeout, and writeTimeout have been added to the mail channel to avoid threads hanging when sending mail.

ECRM-29806

The jTDS drivers in this release have been patched with a fix from jTDS 1.2.3. This patch addresses an infinite loop condition that can occur if a database connection dies during a batch job.

ECRM-29898

An issue that caused an SQL deadlock when executing a batch update has been resolved.

Version 9.3.0.1

AFL-4975

An issue that generated a UI error when you attempted to load a workspace, which was associated with a service persisted class, has been resolved.

AFL-5005

A refresh issue that prevented the entity banner from being updated when switching between items within a workspace has been resolved.

AFL-5022

An issue that caused validation logic to be applied in the UI, even when the corresponding dependency was discharged, has been resolved.

Version 9.3.0.0

AFL-1172

An issue that caused data table columns to be completely hidden when you resized the NexJ CRM user interface because the right and left chevron buttons in the header row for a data table could become hidden has been resolved.

AFL-3399

The Business Phone Number column in the Contacts data table is now named correctly.

AFL-3595

The ability for end users to change the time zone for their activities is supported.

AFL-3730

An issue where sluggish performance would be observed upon performing a multi-select operation has been addressed by constraining the selection limit to 1000 records by default. The contacts multi-select limit is further reduced to 300 records within pickers.

AFL-3868

An issue that caused the table carousel to be completely hidden when you resized the NexJ CRM user interface has been resolved.

AFL-3961

Prior to this release, when you clicked a filter chip to select the values you wanted to filter by, for example, when you clicked the Company filter chip on the Contacts workspace, values longer than a certain character limit appeared cut off and no tooltip was displayed to assist with the selection. This issue has been resolved.

AFL-3969

Prior to this release, the **Status** field was visible in filters and dialogs related to service requests, even when the email-to-service-request functionality was not enabled. This issue has been resolved.

AFL-4015

An issue that caused the application to drill down to the contact detail but the menu to continue to display, when you used an Apple iPhone to access NexJ CRM, tapped a **More Actions** menu, and tapped the name of an entity below the menu, has been resolved.

AFL-4123

Prior to this release, when an activity template was deactivated, an Information icon to indicate the deactivation was missing. This issue has now been resolved.

AFL-4223

Prior to this release, when you had a parent company that had child companies, the **Hierarchy** tab on the Contacts workspace did not display the parent company's child companies correctly. This issue has been resolved.

AFL-4283

An issue that caused an error to be thrown when you clicked the **Manage filters and lists** button, clicked the **Add Filter or List** button, and added your filter or list information has been resolved.

AFL-4287

Prior to this release, when a large value, such as 16387264983275494356, was entered in a field expecting an integer value, validation might not take place and an unexpected error might display. This issue has been resolved.

AFL-4311

Previously, when you added position information to a contact's **Company** field, it was not visible in the **Hierarchy** tab. This has been resolved.

AFL-4367

Prior to this release, filtering the Contacts data table by a custom field that only allowed quick picks did not retrieve results even if matching records exist. This issue has been resolved.

AFL-4377

Prior to this release, when creating a schedule item, if you created another schedule item, task, or document from the **Related** tab of the schedule item, and then added another related item to the first related item, changes to all the three items were saved when you clicked **OK** in the lowest nested dialog, before you clicked **OK** in the parent dialog. This issue has been resolved.

AFL-4426

Prior to this release, if you had access to a contact but not to the company they were associated with, adding that contact to the **For** field of an activity resulted in an unexpected error when you tried to save the change. This issue has been resolved.

AFL-4439

Prior to this release, captions exceeding 20 characters in multi-selection pickers were truncated and shown with an ellipsis appended at the end. This issue has been resolved.

AFL-4452

An issue that caused an unexpected error when you opened a dialog (for example, when you edited a task), closed it without making any changes, and then performed subsequent actions (for example, deleted the task or marked it complete), has been resolved.

AFL-4475

When assigning all users to a task on the Tasks workspace, not all the users' pictures were displaying. This has been resolved.

AFL-4493

Prior to this release, when a user clicked the **Snooze** button, the Reminder dialog sometimes reopened immediately, or did not appear to close. This happened if the clocks of the client workstation and the servers got out of sync with each other by a number of minutes. This issue has been resolved.

AFL-4495

An issue that enabled you to double-click on data tables rows to view read-only fields in the Edit dialog in some cases but not in others, and caused inconsistent availability of the **Edit** button has been resolved.

AFL-4500

An issue where the incorrect header was displaying for the Edit List and Edit Filter dialogs has been resolved.

AFL-4514

An issue that enabled end users to remove default filter chips in the Select filter fields dialog has been resolved.

AFL-4558

An issue that caused duplicate list queries from the navigator table on the Opportunities, Tasks, and Service Requests workspaces has been resolved.

AFL-4571

An issue that caused NexJ CRM to become unresponsive when you clicked the **Manage filters and lists** button on the Contacts workspace, closed the Filters and lists page, and attempted to navigate to a different workspace has been resolved.

AFL-4602

Prior to this release, when users created a filter chip for a string filter field, the `starts with` and `ends with` filter operators did not display for selection. This issue has been resolved.

AFL-4603

Browser-based spell check is now supported. For example, if you have configured Google Chrome to enable enhanced spell check, your browser identifies spelling errors, and you can right-click on misspelled words, and choose corrections from a browser supplied list.

AFL-4637

Prior to this release, if you used Google Chrome as your browser, and you navigated to the Contacts, Opportunities, or Service Requests workspaces, added filter chips, and lowered the resolution of your browser, the captions might not display in the Select filter fields dialog. This issue has been resolved.

AFL-4649

Previously, when selecting a client in the **For** field of an Opportunity and attempting to use type-ahead functionality, you could only access the first 10 items of the candidate list. Now, when you type a letter in the field and there are more than nine responses, there is a **More** option. Clicking on **More** opens a multiple selection dialog.

AFL-4682

An issue that caused the end time for a daily recurring schedule item to propagate incorrectly near the end of the month when you selected **after** and entered 1 day in the **End Time** field in the **Recurrence** tab, and navigated to the **Detail** tab to view the **End Date** field, has been resolved.

AFL-4698

Prior to this release, an issue caused the default contact icon to display for companies that didn't have an image in the **For** field picker in the New Task dialog. This issue has been resolved.

AFL-4699

An issue that caused the filter field change event to be called unnecessarily when you clicked on the **Filter Options** button , selected the **Add filter fields** menu option, added all available filter fields, and switched between filters on the Contacts workspace, has been resolved.

AFL-4701

An issue that generated an error because decimal numbers were rounding incorrectly in the **Expected Amount** field in the New Parent Opportunity dialog has been resolved.

AFL-4703

An issue that caused NexJ CRM to round to the next month, when you used the `(date-add 'month)` function, and you started with a timestamp of the last day of the month, has been resolved.

AFL-4720

Prior to this release, when you selected a view other than today on the Schedule workspace, and then selected the **Today** menu option, the calendar didn't change to display today's schedule. This issue has been resolved.

AFL-4723

Prior to this release, if a user's time zone was sufficiently offset from that of the application server, then when a coverage group was added to a contact, the start dates associated with corresponding users were different by a day. This issue has been resolved.

AFL-4759

In an entity's banner, the full physical address can now be viewed without having to hover it.

AFL-4766

Prior to this release, you were unable to search for contacts by first name or last name in the text search field on the Contacts workspace. This issue has been resolved and full name search is no longer available. Searches using wildcards are still supported.

AFL-4784

Users can now successfully dismiss all alarms by clicking the **Dismiss All** button.

AFL-4791

An issue with the **For** field not updating to the current entity after navigating to the entity through the **Hierarchy** tab has been resolved.

AFL-4797

An issue where the **For** field filter on the Tasks workspace was a single selection dialog rather than a multiple selection dialog, has been resolved.

AFL-4801

Prior to this release, if you were granted the AuditLogView privilege that made the **Audit** tab visible to you, you created a new contact, and edited the contact's **Tier** field, an unexpected error was thrown. This issue has been resolved.

AFL-4822

Prior to this release, when you added a parent or product opportunity on the Opportunities workspace, you added a coverage group to the Team card, and then you attempted to delete the coverage group by clicking **Remove Coverage Group**, a scripting error was thrown. This issue has been resolved.

CPM-588

An issue where `Set!` in the `onSubmit` caused an unexpected error at compilation, has been resolved.

CPM-608

An issue where "Not visible" was displaying in the **For** field of an Advisory note rather than the contact's name, has been resolved.

ECRM-29051

Prior to this release, when you created a new augment for an existing class using NexJ Studio, created a static event for the augment, and referenced the event in the class, for which the augment was created, NexJ Studio exhibited the following behaviors:

- If you used the class name of the augment to call the event, no validation error was generated but the run-time code failed.
- If you called the event with the original class name, the script editor threw an error, there was no run-time error but a framework validation error was generated.

This issue has been resolved.

ECRM-29080

An issue that caused NexJ CRM to freeze and generate an error, when you selected a report type on the Contacts workspace using Mozilla Firefox version 67, has been resolved.

ECRM-29082

An issue that caused the application data to not load in parallel in your development environment, when you set the `concurrentLoadingEnabled` property to `true` in an environment file, has been resolved.

ECRM-29246

The JavaScript parser has been fixed to allow instance attributes of an object to be set.

ECRM-29378

An issue that caused errors when you performed multiple "Reload All" metadata hotswaps in NexJ Studio and refreshed NexJ CRM has been resolved.

ECRM-29529

In order to reduce the potential for startup failures, the default heap size for the NexJ Push Redirector has been changed to 1024 MB.

ECRM-29570

An issue that caused an update on a proxy class with service persistence to return an RPC response with old values has been resolved.

Version 9.2.3.0

AFL-3748

Prior to this release, for deployments using the Hierarchical Access Model for security, users with delegated access could not create a schedule item and then later select the **Restrict access to users in the Assign To** option. This issue has now been resolved.

AFL-4652

When a user starts creating a new contact or activity and then closes the dialog before saving, they will now receive a confirmation message that all the information entered so far in the dialog will be lost.

Version 9.2.2.0

AFL-4509

An issue that caused extra white space to display below the Schedules user list on the Schedule workspace when you resized your browser has been resolved.

AFL-4510

An issue that caused the target page to appear with an undesirable offset when a stepper was embedded in a portal application has been resolved.

Version 9.2.1.0

AFL-4579

An issue that prevented you from adding any additional filter chips to filters, which leverage custom logic for filter chip initialization, has been resolved.

Version 9.2.0.0

AFL-4205

Prior to this release, when you created a follow-up task from an existing activity's **Related** tab, it was assigned to you by default, regardless of how that task type was configured on the **Customize** workspace. This issue has been resolved.

AFL-4226

Prior to this release, if you added a note to an entity record with the edit security set to private, other users were able to add attachments to the note, effectively editing the note. This issue has been resolved.

CDM-3296

An issue that meant that, when you edited a dashboard on the Reports workspace, report titles did not display as expected has been resolved.

Requirements and support information

Supported platform information, full-test stack descriptions, as well as hardware and software requirements for the 24.08 release are listed below.

Software and hardware mentioned below may have their own additional requirements.

Server and database requirements

NexJ Customer Relationship Management is designed to work with a variety of operating systems, databases, and servers.

Each release of the product is tested across a number of configurations of specific versions of each platform. Some specific stacks act as the key environments for our core testing and may change from release to release.

> IBM WebSphere Application Server and IBM HTTP Server are supported only for existing installations. New installations of NexJ CRM must use NexJ Model Server.

Supported platforms

NexJ Model Engine is designed to work with the following operating systems, databases, and servers.

Operating systems

- Windows Server
- CentOS
- Red Hat Enterprise Linux
- Microsoft Windows

Application servers

- NexJ Model Server

Web servers

- Apache HTTP Server
- Microsoft Internet Information Services (IIS)

Database servers

- Microsoft SQL Server
- Oracle Database
- PostgreSQL

> In addition, MySQL is supported as a data source for integration purposes. Using MySQL as the main system data source for NexJ Customer Relationship Management is currently not supported.

Email and calendaring servers

- Microsoft Exchange Server

Java platforms

Java SE Development Kit 8 (JDK 8) - Oracle, IBM
Java SE Development Kit 11 (JDK 11) - OpenJDK, Oracle, IBM
Java SE Development Kit 17 (JDK 17) - OpenJDK, Oracle, IBM

Tested systems, servers, and databases

Testing of NexJ Customer Relationship Management makes use of the following versions of operating systems, application servers, web servers, and databases.

Operating systems

- CentOS 6.7
- CentOS 7

Application servers

- NexJ Model Server 24.08

Web servers

- Apache HTTP Server 2.4.6
- IBM HTTP Server 8.5.5

Databases

- Microsoft SQL Server 2016
- Microsoft SQL Server 2017

- Microsoft SQL Server 2019
- Oracle 11g
- Oracle 12c
- Oracle 19c

Microsoft Exchange servers

- Exchange Server 2016
- Exchange Online

Core test stacks

The following stacks formed the core test environments for NexJ CRM 24.08.

Each row of the following table represents a single core testing stack used during the development and test cycle of version 24.08. Where applicable, additional version details are provided following the table.

Application server	Web server	Database	Java version	Java implementation
NexJ Model Server	Apache/2.4.6	Oracle 19c	JDK 17	OpenJDK
NexJ Model Server	Apache/2.4.6	Oracle 11g R2	JDK 8	Oracle Java
NexJ Model Server	Apache/2.4.6	MSSQL 2017	JDK11	OpenJDK
NexJ Model Server	Apache 2.4.6	MSSQL 2019	JDK 11	OpenJDK

Application server details

The following list provides additional information for the application server entries in the table above.

NexJ Model Server
Every release of NexJ CRM includes the version of NexJ Model Server that must be used alongside it.

Web server details

The following list provides additional information for the web servers entries in the table above.

Apache 2.4.6
Apache HTTP Server 2.4.6

Database details

The following list provides additional product names and version information for the database entries in the table above.

Oracle 11g
Oracle Database 11g (11.2.0.1.0)

Oracle 12c
Oracle Database 12c (12.1.0.2.0)

Oracle 19c
Oracle Database 19c (12.2.0.3.0)

MSSQL 2016
Microsoft SQL Server 2016 (13.0.4259.0)

MSSQL 2017
Microsoft SQL Server 2017 (14.0.3025.34)

MSSQL 2019
Microsoft SQL Server 2019 (15.0.2000.5)

Java details

The following list provides the additional product names and version information for the Java entries in the table above.

NexJ Model Server
Java SE Development Kit 11 (JDK 11)
Java SE Development Kit 17 (JDK 17)

Required database drivers

NexJ Customer Relationship Management uses various drivers to communicate with its supported databases. To ensure successful communication with your databases, use the driver versions below when you deploy NexJ Customer Relationship Management.

Database servers for deployment and data integration

Microsoft SQL Server

To run on or integrate with Microsoft SQL Server databases, use the `jtds-1.2.2-9.jar` driver located in the `%NEXJ_PLUGIN%\ext` folder. For example, if you install NexJ Studio in `C:\nexj_studio\13.x`, the driver will be in `C:\nexj_studio\13.x`\`plugins\com.nexjsystems.nexjstudio_version\ext`.

Oracle database

To run on or integrate with Oracle databases, your database administrator should contact NexJ in order to get information on the specific driver version and patches required for your installation.

PostgreSQL

To run on or integrate with PostgreSQL data sources, you should use the `postgresql-version.jdbc.jar` driver provided with your PostgreSQL distribution.

Database servers for data integration only

MySQL

To integrate with MySQL data sources, you should use the `mysql-connector-java-version` driver provided with your MySQL distribution.

NexJ client requirements

The following topics provide the hardware and software requirements for accessing NexJ CRM from various client devices.

NexJ CRM end user system requirements (desktop)

To run a NexJ application client such as NexJ CRM, the end user's computer must meet the following requirements.

Minimum required workstation specifications

Processor
Intel Core 2 Duo 2.33GHz

Memory
4 GB RAM

Operating System
Windows 10

Resolution Display
1280 x 1024

Additional software requirements

The following additional software is required in order to use specific supplementary functions and features:

- A PDF viewer application, such as Adobe Reader, to view PDF documents and to generate attachment previews.
- Microsoft Office to view Microsoft supported documents.
- Microsoft Outlook desktop version to use NexJ Outlook Add-In feature included with NexJ Add-In for Microsoft Office.
- Microsoft Word desktop version to generate and edit documents for use with the NexJ Mail Merge feature included with NexJ Add-In for Microsoft Office.

Recommended workstation specification*s*

Processor
Intel Core i5 or Intel Core i7

Memory
6 GB RAM or higher

Operating system
Windows 10

Resolution display

- 1920 x 1080 (desktop)
- 1600 x 900 (laptop)

For optimal NexJ CRM performance and appearance, use the following recommended configuration:

- Set Windows display resolution to 96 DPI (100%)
- Set your browser zoom level to 100%

Other display configurations may not be supported.

Browsers

NexJ CRM 24.08 was tested on the latest versions of the following browsers:

- Google Chrome
- Microsoft Edge
- Microsoft Internet Explorer 11

  Internet Explorer 11 is supported only for existing on-premises installations, and not for Cloud-deployed environments.

Microsoft Edge security note
To improve the security of your information, NexJ recommends disabling the following two options, if they are available in your deployment:

- **Get image descriptions from Microsoft for screen readers** option at `edge://settings/accessibility`
- **Enhance images in Microsoft Edge** option at `edge://settings/privacy`

Spell-checking in Microsoft Edge and Google Chrome
NexJ recommends that you enable the basic spell-checking assistance setting.

- In Google Chrome Settings, navigate to **Languages > Spell check** and enable the **Basic spell check** option.
- In Microsoft Edge Settings, navigate to **Languages > Writing assistance > Enable grammar and spellcheck assistance** and enable the **Basic** option.

NexJ cannot control where the browser sends text when advanced spell-checking is enabled and is not responsible for this action. The same applies for any mobile phone applications that may be monitoring the clipboard, keyboard, or text.
In addition, using external browser extensions such as Grammarly may cause unexpected application behavior in text input fields.

NexJ CRM end user system requirements (mobile)

NexJ CRM supports the following mobile configurations.

Tested smartphone specifications

- Apple iPhones running Apple iOS. The following iOS versions are supported:
    - iOS 17.X

Browser

- Apple Safari - supported only on iOS devices

NexJ Studio hardware and software requirements

Your system must meet the following requirements to be able to install and use NexJ Studio.

Operating Systems

- Microsoft Windows 10

The 64-bit version of the Microsoft Windows operating system is recommended.

Minimum hardware requirements

- 12 GB RAM (16 GB or higher recommended)
- 2 GB free disk space for each workspace

Software

- Java SE Development Kit 8 (JDK 8 and JRE 8)
- Java Runtime Environment 11 (JDK 11 and JRE 11)
- Java SE Development Kit 17 (JDK 17 and JRE 17)

> You must use either Java SE 8, Java SE 11, or Java SE 17. Only one version can be used for a single install. If you are upgrading from version 8 to version 11 or later, see Upgrading to NexJ CRM version 24.05 for information regarding mandatory keystore upgrades.

NexJ Data Mapping Tool minimum requirements

Your system must meet the following requirements to use the NexJ Data Mapping Tool.

Minimum Software Requirements

- Microsoft Windows XP
- Microsoft .NET Framework 3.5

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

End of support information

The following hardware, software and product functionality is no longer supported for use.

Deprecated features

IBM WebSphere Application Server and IBM HTTP Server are supported only for existing installations. This support will be removed in an upcoming release. New installations of NexJ CRM must use NexJ Model Server.

As of version 22.09, Highcharts library is no longer supported if you are accessing NexJ CRM using the classic interface. If you are accessing NexJ CRM with the default interface included with version 9.4 and all subsequent versions, the Highcharts library continues to be supported.

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