NexJ CRM Release Notes

Published June 6, 2025

NexJ Systems Inc.

+1 (416) 222-5611

info@nexj.com - www.nexj.com

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

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-25.05.0.0-1306.1307.181.55-edcb420.jar

Framework Plugin: com.nexjsystems.nexjstudio_13.31.24.0.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-d184a89d.jar
- nexj-meta-dm-0.0.1.0-10-91eaa677.jar
- nexj-meta-financereport-2.7.0.0-0.0.41-bc81e4bb.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

Requirements and support information

Supported platform information, full-test stack descriptions, as well as hardware and software requirements for the 25.05 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 25.05

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 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 25.05.

Each row of the following table represents a single core testing stack used during the development and test cycle of version 25.02. 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 12c 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 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 specifications

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 25.05 was tested on the latest versions of the following browsers:

- Google Chrome
- Microsoft Edge
- Microsoft Internet Explorer 11

> Internet Explorer 11 is currently supported only for existing on-premises installations, and not for Cloud-deployed environments.
> Support for Internet Explorer 11 is being deprecated. The last supported release is 25.05.

> **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 18.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.

Upgrade notes

This section includes the descriptions of schema changes, environment changes, and other information needed for upgrading for most recent releases. For upgrade notes for previous releases, refer to online documentation for version 23.11 at Upgrade notes[1].

Schema changes for 25.05

Schema-level changes

New tables

- NJGraphAPIServer
- NJGraphAPIMailbox
- NJGraphAPIFolder

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	addressee							

1 https://documentation.nexj.com/crm-technical/23.11/Public-On-Prem/upgrade-notes

Environment file changes for 25.05

The following properties have been added to the environment file.

- These two properties are related to a feature that is currently in development. Do not do not set or change any related values.
  - graphAPI.enabled
  - graphBroker.tenantId

Data source connections

No changes to the data sources were made in the release.

Channel connections

The following channel has been added to the environment file.

- GraphAPISender
  - This channel is related to a feature that is currently in development. Do not do not set or change any related values.

Mixins

No new mixins were added to the environment file.

Additional upgrade notes for 25.05

Enabling TLS1.3

1. Ensure OpenSSL is installed locally.
2. Acquire Tomcat Native.
   - (Windows) The library is included with the release package, but you can also download the latest 2.X version of tcnative from Apache Tomcat - Tomcat Native Downloads[2]
   - (Linux) Download tcnative from Apache Tomcat - Tomcat Native Downloads[3] or through your local package manager using the command `sudo apt install libtcnative-2`
3. Configure environment to use tcnative.
   - (Windows) If tcnative has not been distributed through the plugin, move the tcnative.dll file to a folder accessible to Tomcat, such as within java.library.path.
   - (Linux) Add the link to tcnative to your LD_LIBRARY_PATH:

2 https://tomcat.apache.org/download-native.cgi
3 https://tomcat.apache.org/download-native.cgi

```
export LD_LIBRARY_PATH=$LD_LIBRARY_PATH:/usr/local/apr/lib
```

4. Set application properties to use tcnative with TLS1.3.
   - To use only TLS1.3:

```
-Dhttps.protocols=TLSv1.3
-Dhttp.connector.SSLProtocol=TLSv1.3
-Dpush.connector.SSLProtocol=TLSv1.3
-Dajp.connector.SSLProtocol=TLSv1.3
```

   - To use TLSv1.2 and 1.3 simultaneously:

```
-Dhttps.protocols=TLSv1.2,TLSv1.3
-Dhttp.connector.SSLProtocol=+TLSv1.2,+TLSv1.3
-Dpush.connector.SSLProtocol=+TLSv1.2,+TLSv1.3
-Dajp.connector.SSLProtocol=+TLSv1.2,+TLSv1.3
```

5. To validate that TLS1.3 is enabled, look for log entries similar to the following on startup:

```
Loaded Apache Tomcat Native library [2.0.8] using APR version [1.7.4].
APR/OpenSSL configuration: useAprConnector [false], useOpenSSL [true]
OpenSSL successfully initialized [OpenSSL 3.0.14 4 Jun 2024]
Starting ProtocolHandler ["https-openssl-nio-7080"]
```

> If you do not include these properties, the system will fallback to JSSE, which has non-compliant client certificate authentication.
> You must use the plus sign (+) in the SSLProtocol properties to ensure the protocol is included. (You can also use the minus sign (-) to explicitly remove a protocol from inclusion. Failing to use the + or - syntax will default to inclusion, and cause warnings in the logs.

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

The following property has been added to the ExchangeEWSSender7 channel

- maxSenders

Mixins

No new mixins were added to the environment file.

Additional upgrade notes for 25.02

- You must update pgAdmin to the latest version, because the `lc_collate` parameter is not recognized for PostgreSQL 16.
- The following values must be changed in the environment setup for PostgreSQL:
  - max_prepared_transaction = 1000
  - max_connections = 250

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.

New features

This section lists features and enhancements that have been added to the product over the last several releases. For new features and enhancements added previously, refer to online documentation for version 23.11 at New features[4].

New features delivered in 25.05

Import workspace enhancements

CSV file imports

When importing records, users can now select a standalone CSV file, in addition to the ZIP file format supported in previous releases (CRM-2753). This option is specified on the Import Data dialog. This update simplifies the import process by removing the need to prepare and upload a full ZIP package, streamlining onboarding and making data import more accessible for business users.

Dynamic mapping file locations

The import process now supports dynamic mapping file locations, removing the need for server redeployment when mapping configurations change (CRM-3545).

- Mapping files are no longer tied to static server-side event paths.
- This makes it easier to add or update mappings as needed, streamlining deployment and support for evolving import requirements.

This enhancement improves flexibility and reduces operational overhead during import configuration updates.

Other import enhancements

The import process has been streamlined with usability improvements to reduce clicks and improve clarity (CRM-3440).

- Users now receive notifications when each stage is completed.
- Replaced multi-step actions with simplified buttons:
    - **Submit for Matching** now appears directly in the toolbar.
    - **Complete Import** replaces multi-step confirmations and processes all visible data.
- The user is returned to the Import workspace after each stage.
- Status updates are shown clearly, and progress is tracked visually.

---

4 https://documentation.nexj.com/crm-technical/23.11/Public-On-Prem/new-features

These enhancements make importing faster and more intuitive for users.

Reporting enhancements

You can now export detailed reports in the Excel (.xslx) format, by selecting the **Details (Excel)** option from the **Export** menu. This allows you to keep the data formatting set up in NexJ CRM (CRM-2891).

Currency fields in the Summary and Visualization tabs of reports now display rounded whole numbers by default, improving readability and consistency with client expectations (CRM-3402). This change also applies to exported outputs from these tabs. This setting is controlled in the NexJ SysAdmin Console, by the new **Reporting > Format > Display Currency Whole Units in Summary/Visualization** setting.

The Email Subject Prefix specified on the **Details** tab of a report is now included in the header of each page of the exported file, as well as in the filename (CRM-3412).

Native notifications

The application can now display native notifications that appear in the browser and on a mobile device (CRM-3380). You can enable the notifications by agreeing to the request when it appears or from the User Settings dialog.

In this release, the browser notifications are only displayed for alarms and only while the application is running in the browser. The notifications are not displayed if the application tab has been closed.

Hierarchy enhancements

When viewing the hierarchy for an entity you can now limit the number of nodes displayed and refocus the display to show the hierarchy for any selected node (CRM-3654). Use the **Focus** button on any hierarchy node to refocus the display on that entity.

Hierarchy entries of the same type (for example, multiple “Accountant” contacts) are now grouped under a single node, improving clarity and reducing clutter in the Hierarchy tab (CRM-3507). Instead of listing each instance separately, contacts in the same relationship are now visually grouped under a shared role header.

Including household member activities in Household Detail Report

Users running the predefined Detail Report on a household can now choose to include activities from household members, not just activities assigned to the household itself (CRM-2539). This ensures more complete reporting for compliance and audit purposes.

On the Households tab of the Contacts workspace, select click the **Reports** button on the table toolbar, and select **Detail Report**. In the **Specify Report Parameters** dialog, select **Show Activities**, and select **Show Activities of Household Members**.

This option is disabled by default.

New Addressee field and merge field

When creating or editing a company record, you can now specify the person or entity to whom correspondence should be directed in the new **Addressee** field (CRM-2538).

When printing a document for a company, you can use the `${addresseeMergeField}` token to refer to this value.

Other usability enhancements

On the Opportunities workspace, when you use the **For** filter, you can now select multiple values so that you can search for opportunities for multiple entities (CRM-2534).

On the Home workspace, in the **Updated Activities** tab, you can now see additional details about an activity in the Preview sidebar by clicking the row with the activity record (CRM-3282).

Accessibility enhancements

Keyboard navigation for lists

You can now use the keyboard to navigate and use lists (CRM-1820). Use the following keys for navigation.

Keyboard keys	List navigation
up arrow	Navigate to the previous item
down arrow	Navigate to the next item

Keyboard keys	List navigation
Home	Navigate to the first item
End	Navigate to the last item
Delete	Delete the item
Enter	Activates the item-level command menu
Alt + up arrow	Navigate to the previous zone of the list. List zones can include the list-level commands, the items in the list, and the list footer with navigation such as **More** and **View All** buttons.
Alt + down arrow	Navigate to the next zone of the list. List zones can include the list-level commands, the items in the list, and the list footer with navigation such as **More** and **View All** buttons.

Keyboard navigation for dropdown menus

You can now use the keyboard to navigate and use dropdown menus (also known as dropdown lists, selection fields, or combo boxes) (CRM-1822). Use the following keys for navigation.

Keyboard keys	Dropdown menu **navigation**
up arrow	Navigate to the previous option
down arrow	Navigate to the next option
Home	Navigate to the first option
End	Navigate to the last option
Delete	Clear the selection

Keyboard keys	Dropdown menu **navigation**
Enter	Select the option

Keyboard navigation for tabs

You can now use the keyboard to navigate and use tabs (CRM-1843). Use the following keys for navigation.

Keyboard keys	Tab **navigation**
up arrow	Navigate to the previous tab
left arrow	Navigate to the previous tab
down arrow	Navigate to the next tab
right arrow	Navigate to the next tab
Home	Navigate to the first tab
End	Navigate to the last tab
Space	Select the tab
Enter	Select the tab

Security enhancements

- Addressed security vulnerabilities related to the use of Apache POI library (CRM-799).
- Introduced support for TLS 1.3 to secure communication with the NexJ Server (CRM-1115). For information about enabling TLS 1.3, see Upgrade notes (page 13) .
- Apache Tomcat has been upgraded to version 9.0.102 (released by the Apache Software Foundation on March 3, 2025)(CRM-3621).
- The `keycloak` keyword in user login IDs is now case-insensitive (CRM-3139). For example, both `keycloak:user@email.com` and `Keycloak:user@email.com` would be accepted.

New features delivered in 25.02.1.0

Security enhancements

Apache Tomcat has been upgraded to version 9.0.102 (released by the Apache Software Foundation on March 6, 2025) (CRM-3648).

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 compare them against a pre-configured list of "trusted" hosts. You can also inspect the optional X-Forwarded-Host header.
- 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)[5].

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).

5 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 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)

Resolved issues

This section includes the list of issues resolved during the most recent releases. For resolved issues for previous releases, refer to online documentation for version 23.11 at Resolved issues[6].

Version 25.05

CRM-2126

Fixed an issue where schedule items that were initially synchronized with Microsoft Exchange calendar and were subsequently assigned to a template that explicitly disables synchronization with Microsoft Exchange, were still synchronized with Microsoft Exchange.

CRM-2499

Previously, applying a filter that used an `IF()` calculated field (such as `IF('Close Year'=2024 ,'Actual Amount', 'Expected Amount') > 1`) would cause an unexpected SQL error and prevent the report from running. This issue has been resolved.

CRM-2948

Previously, users without the `mda:OpportunitiesEnabled` privilege could still see the Opportunity workspace, related tabs, badges, and reporting fields, which contradicted the intended permission behavior. This issue has been resolved.

CRM-2973

Previously, when an opportunity was deleted, the “Has Opportunity” badge was still displayed on the banner for the contact. This issue has been resolved. The badge now disappears as expected once the opportunity is removed, improving accuracy and visual clarity across contact records.

CRM-3057

Previously, attempting to create a new schedule item from the Schedule workspace in Month view could result in a “Type mismatch in vector-ref” error under certain conditions, such as after a UI reset. This has been fixed. Users can now launch the schedule item creation dialog without encountering this error, and the item will default to today’s date.

CRM-3193

6 https://documentation.nexj.com/crm-technical/23.11/Public-On-Prem/resolved-issues

Previously, deleting one calculated field from a report containing multiple aggregate calculated fields could result in an unexpected error when navigating collections. This issue has been resolved.

CRM-3279

Previously, when editing a recurring activity using the “This and all following” option, updated names did not appear in the **Latest Activities** tab until a manual refresh was performed. This issue has been resolved.

CRM-3363

Previously, SLM records with a target date matching the report’s end date (for example, 0 days until target) were incorrectly excluded from the predefined SLM Touches Report unless the “Include Overdue Touches” option was enabled. This behavior led to incomplete reporting for users who expected same-day touchpoints to be included.

With this update, 0-day targets are now treated as valid for the entire day, ensuring that such records are included in the report even when “Include Overdue Touches” is unchecked. This change aligns with user expectations that same-day targets are not yet overdue.

CRM-3496

Previously, searching in the **Period** filter chip on the Service Level Management workspace resulted in an unexpected error. This issue has been resolved.

CRM-3511

Previously, non-administrative users were able to access and export sensitive Entitlements data through user reports, despite not having access to the NexJ Admin Console. This has been resolved.

CRM-3598

The **Maximum Streaming Error Count** field is now displayed in NexJ SysAdmin Console for Exchange Online synchronization targets.

CRM-3692

Previously, when scheduling an item assigned to another user, the system incorrectly checked for conflicts against the current user’s calendar instead of the calendar of the user in the **Assign To** field. This issue has been resolved.

CRM-3695

Previously, if a report contained only a string-based calculated field, it would fail to execute and throw an unexpected error. This issue has now been resolved. Reports using calculated string expressions as their sole field now run as expected without error.

CRM-3697

Previously, after refreshing the browser when creating or editing dashboards on the Reports workspace, settings that are defined in NexJ SysAdmin Console were sometimes not initialized. This caused fields that should have been hidden, such as those controlled by reporting email configuration settings, to incorrectly remain visible when creating or editing dashboards. This issue has been resolved.

CRM-3731

Previously, exporting a report in the Detail (Excel) format that included a calculated field caused the export to hang and never complete. This also impacted scheduled exports and share by email functionality when Detail (Excel) format was selected. This issue has been resolved.

CRM-3734

Previously, a data volume exception prevented the server from starting when there were more than 4096 saved filters or lists for the entire deployment. Now, the error only occurs if a single user has more than 4096 filters or lists with the security code set to "owner" or there are more than 4096 filters or lists that have a security code of “public” across the deployment.

Note: If this error occurs, you must override the query read limit until the number of saved filters or lists have been reduced.

CRM-3894

Previously, when using the Import workspace and selecting **Process Selected** or **Process List** during a lead import resulted in no leads being created, despite the process appearing to run. This has been resolved by removing the “process” options for leads imports, aligning with the intended behavior and preventing confusion.

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-2485

Previously, during JVM crashes or OOM situations, a heap dump was not generated if the default location did not have write permissions or had insufficient storage space. This issue is resolved by using the new environment variable JAVA_HEAPDUMP_PATH to indicate where the heap dump should be saved.

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.

CDM-5054, CRM-415

Previously, you could not apply multiple filters fields one by one to a dashboard for ad hoc reporting as adding a new filter field erased the filter field that had been previously added. This issue has been resolved.

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.

Known issues and workarounds

The following is 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

This section describes known issues that pertain to ad hoc report (NexJ Reporting) 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-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-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.

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.

Legal Notices

Trademarks

NexJ trademarks

NexJ, the NexJ Logo and “Business is About Relationships” are trademarks of NexJ. All other products, services, brands, company names and logos used herein are the trademarks of their respective owners. Any use of any of the marks appearing herein without the express written consent of NexJ or the owner of the mark, as appropriate, is strictly prohibited. While certain trademarks of third parties may be used by NexJ under license, the display of third-party trademarks should not be taken to imply any relationship or license between NexJ and the owner of said trademark or to imply that NexJ endorses the wares, services or business of the owner of said trademark.

Other trademarks

The following terms are trademarks or registered trademarks of other companies and have been used in at least one of the documents in the product documentation:

Android is a trademark of Google Inc.

Apache, Apache ActiveMQ, Apache Ant, Apache Avro, Apache FOP, Apache HTTP Server, Apache JMeter, Apache Kafka, Apache log4j, and Apache Tomcat Connector are either registered trademarks or trademarks of the Apache Software Foundation in the United States and/or other countries. No endorsement by The Apache Software Foundation is implied by the use of these marks.

Apple, iPad, and Safari are trademarks of Apple Inc., registered in the United States and other countries.

Docker and the Docker logo are trademarks or registered trademarks of Docker, Inc. in the United States and/or other countries. Docker, Inc. and other parties may also have trademark rights in other terms used herein.

Elastic is a trademark of Elasticsearch BV.

Google, Google Chrome, and Google Maps are registered trademarks or trademarks of Google Inc.

Grafana is a registered trademark of Coding Instinct.

Grapevine6 is a registered trademark of Grapevine6 Inc.

IBM, WebSphere, AIX, DB2, WebSphere, Lotus, and Domino are trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide.

InfluxDB and Chronograf are trademarks or registered trademarks of InfluxData.

Intel is a trademark or registered trademark of Intel Corporation or its subsidiaries in the United States and other countries.

IOS and WebEx are trademarks or registered trademarks of Cisco in the United States. and other countries and are used under license.

Red Hat, and JBOSS are registered trademarks of Red Hat, Inc. in the United States and other countries.

Kubernetes is a registered trademark of The Linux Foundation.

Linux is the registered trademark of Linus Torvalds in the United States and other countries.

Microsoft, Excel, Internet Explorer, Outlook, SQL Server, Windows, Windows Server, Windows Vista, and the

Windows logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Mozilla and Firefox are trademarks or registered trademarks of the Mozilla Foundation.

Nylas is a trademark or registered trademark of Nylas.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Progress, SonicMQ, and Telerik Fiddler are trademarks or registered trademarks of Progress Software Corporation in the United States and other countries.

Prometheus is a trademark of The Linux Foundation.

SAP, and SAP Adaptive Server are the trademarks or registered trademarks of SAP SE in Germany and in several other countries.

SoapUI is a registered trademark of SmartBear Software Inc.

Splunk is a registered trademark of Splunk Inc. in the United States and other countries

TIBCO, JasperReports, and Jaspersoft are either registered trademarks or trademarks of TIBCO Software Inc. and/or its subsidiaries in the United States and/or other countries.

UNIX is a registered trademark of The Open Group in the United States and other countries.

Other company, product, or service names may be trademarks or service marks of others.

NexJ Systems Inc.
P: 416 222 5611
info@nexj.com - www.nexj.com