NexJ CRM Release Notes

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About NexJ Systems

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

Table of Contents

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-9.4.13.0-1118.1307.168.53-27a96c0c.jar

Framework Plugin: com.nexjsystems.nexjstudio_13.8.63.0.zip

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. These release notes

Requirements and support information

Supported platform information, full-test stack descriptions, as well as hardware and software requirements for the 9.4 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 should make use of 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
- IBM WebSphere Application Server

Web servers

- Apache HTTP Server
- IBM HTTP Server (IHS)
- Microsoft Internet Information Services (IIS)

Database servers

- Microsoft SQL Server
- Oracle Database

> In addition, MySQL, IBM DB2, and PostgreSQL are supported as data sources for integration purposes. Using MySQL, PostgreSQL, or IBM DB2 as the main system data source for NexJ Customer Relationship Management is currently not supported.

Email and calendaring servers

- Microsoft Exchange Server

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 9.4
- IBM WebSphere Application Server 8.5.5 (service pack 12 and service pack 14)

  > IBM WebSphere Application Server 8.5.5 service pack 13 is not supported.

Web servers

- Apache HTTP Server 2.4.6
- IBM HTTP Server 8.5.5

Databases

- Microsoft SQL Server 2012
- Microsoft SQL Server 2017
- Oracle 11g
- Oracle 12c

Microsoft Exchange servers

- Exchange Server 2010
- Exchange Server 2013
- Exchange Server 2016
- Exchange Online

Core test stacks

The following stacks formed the core test environments for NexJ CRM 9.4.

Each row of the following table represents a single core testing stack used during the development and test cycle of Version 9.4. Where applicable, additional version details are provided following the table.

Application server	Web server	Database	Java
NexJ Model Server	Apache/2.4.6	Oracle 11g R2	JDK 8
WebSphere 8.5.5.12	IHS 8.5.5	Oracle 12c	JDK 8
NexJ Model Server	Apache 2.4.6	MSSQL 2012	JDK 8
NexJ Model Server	Apache 2.4.6	MSSQL 2017	JDK 11

Application server details

The following list provides additional information for the application server entries in the table above.

WebSphere 8.5.5.12
IBM WebSphere Application Server 8.5.5.12 is listed, but 8.5.5.14 and later versions in the 8.5.5.x series are also supported. Version 8.5.5.13 is not supported.

NexJ Model Server
Every release of NexJ CRM includes the version of NexJ Model Server that should be used alongside it.

Web server details

The following list provides additional information for the web servers entries in the table above.

Apache 2.4.6
Apache HTTP Server 2.4.6

Database details

The following list provides additional product names and version information for the database entries in the table above.

Oracle 11g
Oracle Database 11g (11.2.0.1.0)

Oracle 12c
Oracle Database 12c (12.1.0.2.0)

MSSQL 2012
Microsoft SQL Server 2012 (11.0.3128.0)

MSSQL 2017
Microsoft SQL Server 2017 (14.0.3025.34)

Java details

The following list provides the additional product names and version information for the Java entries in the table above.

IBM WebSphere
IBM SDK, Java Technology Edition, Version 8

NexJ Model Server
Java SE Development Kit 8 (JDK 8)
Java SE Development Kit 11 (JDK 11)

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, you should 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.

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.

PostgreSQL
To integrate with PostgreSQL data sources, you should use the `postgresql-version.jdbc.jar` driver provided with your PostgreSQL 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 7

Resolution Display
1280 x 1024

Additional software requirements

The following additional software is required in order to make use of 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 7 and 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

- Current version of Mozilla Firefox (73.0)
- Current version of Google Chrome (80.0)
- Current version of Microsoft Internet Explorer 11

Mozilla Firefox is only supported in the newer material-design-based UI. To access the classic UI, use Google Chrome or Microsoft Internet Explorer.

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 12.X
  - iOS 13.X

Browsers

- Current version of 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 7
- 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)
- Java Runtime Environment 8 (JRE 8)

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.

Upgrade notes

Schema changes for 9.4

Schema-level changes

New tables

- NJAccountPlan
- NJAccountPlanXOverview
- NJAccountPlanEntity
- NJAccountPlanOpportunity
- NJAttachmentXAccountPlan
- NJAccountPlanCov
- NJRisk
- NJCompetitor
- IFInterest
- IFVersion

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJUserField
- NJEnumDisplay
- NJEnumCode

Table-Level Changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
NJUserField	userFieldTypeId				UserField.FK_Type			
NJAct	accountPlanId				Act.FK_AccountPlan			
NJAct	accountPlanModified							
NJActSeries	accountPlanId				ActSeries.FK_AccountPlan			
NJActSeries	accountPlanModified							

Environment file changes for 9.4

- The following flags were added to the Environment file:
    - rest.configMetadata
    - rest.schemaBase
    - rest.version
    - rest.defaultPageSize
- Removed SQLHook "nexj.core.persistence.sql.ObjectQueueHook" from the Environment file and moved it to ObjectQueueDatabase.datasource

Data Source Connections:

Added	Removed
inform:Inform RelationalDatabaseConnection	

Channel Connections:

Added	Removed
inform:ArticleSearch HTTPConnection	
rest:OpenAPI HTTPConnection	
rest:REST HTTPConnection	
rest:SelectionOptions HTTPConnection	
inform:RelatedObject HTTPConnection	

Mixins:

Added	Removed	Updated minimum version
nexj:model:restapi		
nexj:model:inform		
		nexj:model:afl
		nexj:model:afl-mda
		nexj:model:portal

Schema changes for 9.3

Schema-level changes

New tables

- RPTOrderBy (included as of 9.2.2.0)
- RPTExecutedFiles (included as of 9.2.2.0)
- RPTEmailTarget (included as of 9.2.2.0)

Renamed tables

No tables have been renamed.

Dropped & recreated tables

No tables need to be dropped & recreated.

Removed tables

No tables were removed.

Existing tables affected by DML Upgrade SQL scripts

- NJEnumDisplay
- NJProcess
- RPTRecalculate (included as of 9.2.2.0)

Table-Level Changes:

Modified Table	New Column	Modified Column	Renamed Column	Removed Column	New Index	Renamed Index	Dropped & Recreated Index	Removed Index
RPTCalculatedValue (modified as of 9.2.2.0)		field						

RPTGroupBy (modified as of 9.2.2.0)		field						
RPTDashboard Item (modified as of 9.2.2.0)	caption							
RPTDashbaord Item (modified as of 9.2.2.0)	description							
RPTFile (modified as of 9.2.2.0)	executedReport				File.FK_ExecReport			
RPTFile (modified as of 9.2.2.0)	createTime							
RPTFile (modified as of 9.2.2.0)	executedFiles				File.FK_ExeFile			
RPTFile (modified as of 9.2.2.0)		mimeType						
RPTFileName (modified as of 9.2.2.0)								FileName.UNIQ
RPTScheduled Report (modified as of 9.2.2.0)	executedTime							

Environment file changes for 9.3

- Added theme flag to Environment (to specify UI theme to load).

Channel Connections:

Added	Removed
ExchangeEWSSender6 HTTPConnection	

Mixins:

Added	Removed	Updated minimum version
		nexj:model:afl
		nexj:model:afl-mda
		nexj:model:portal

New features

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

New features delivered in 9.4.7

The following enhancement was included as part of 9.4.7.0.

Security enhancement

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

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

New features delivered in 9.4.0

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

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Managing the profile images for contacts and companies

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

Observing interface loading progress

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

Reordering favorite filters

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

Entity management enhancements

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

Manage account plans for companies

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

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

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

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

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

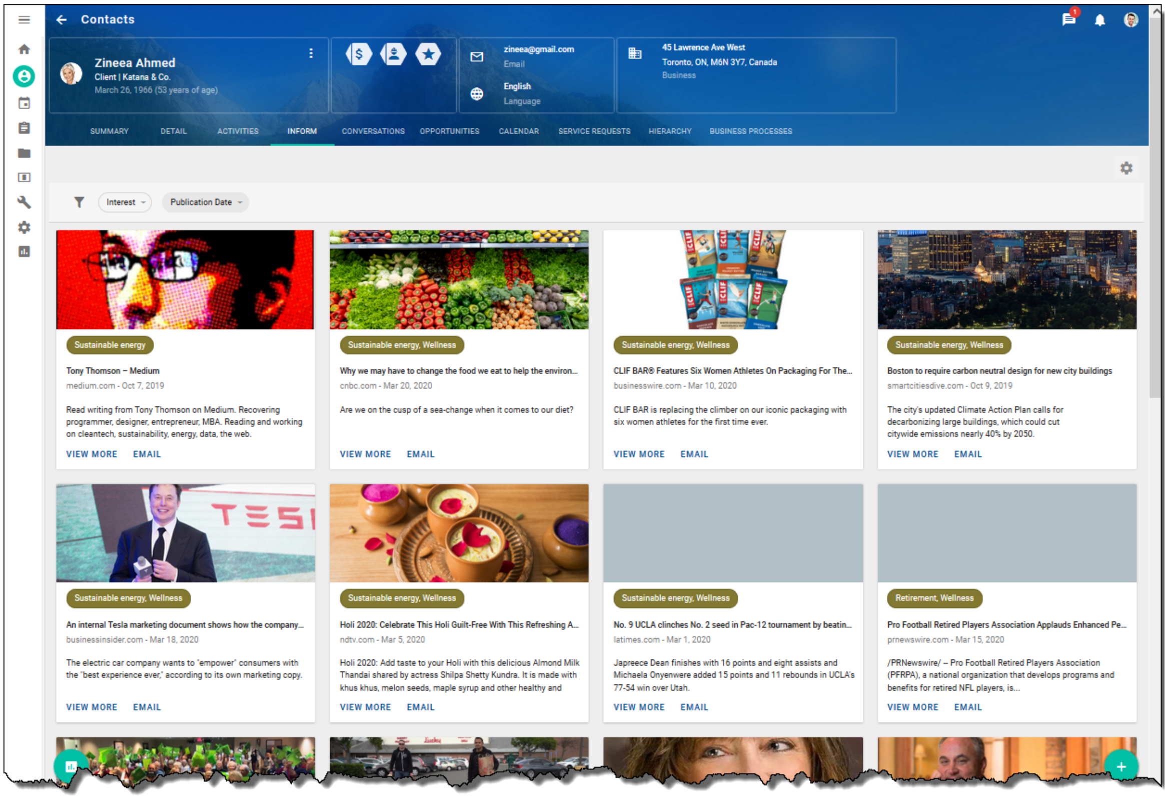
Share articles of interest with contacts

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

Key capabilities include:

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

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



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

For more information about deploying Inform, see (9.4) Deploying Inform.

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Localizing forms

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

For more information about form localization, see (9.4) Developing Process Management forms.

Reporting enhancements

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

Reordering values in chart visualizations

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

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

Collections support

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

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

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

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

Currency conversion support

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

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

Technology enhancements

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

REST API v2 and Inform

REST API v2 support has been introduced in this release. It is required by Inform functionality to communicate with NexJ CRM. For more information, see (9.4) Enabling and configuring REST API v2.

Support for Internet Explorer 11 web browser

NexJ CRM version 9.4 supports Microsoft Internet Explorer 11.

New features delivered in 9.3.0

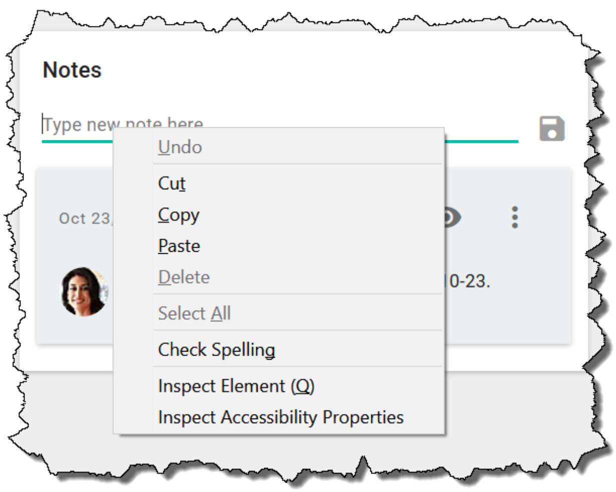
The following features and enhancements were included as part of 9.3.0.0.

NexJ CRM user experience enhancements

This release includes the following enhancements to the user experience.

Browser right-click menu is enabled

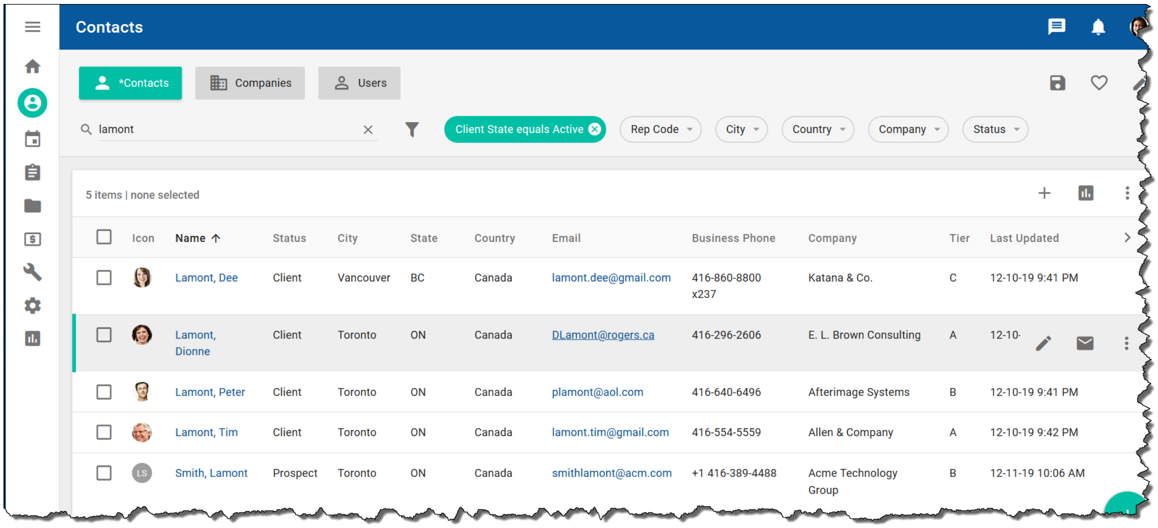
You can now use the browser right-click menu within input fields. This simplifies common tasks such as pasting copied text into **Notes** fields and spell-check.



Searching for contacts and users

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

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



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

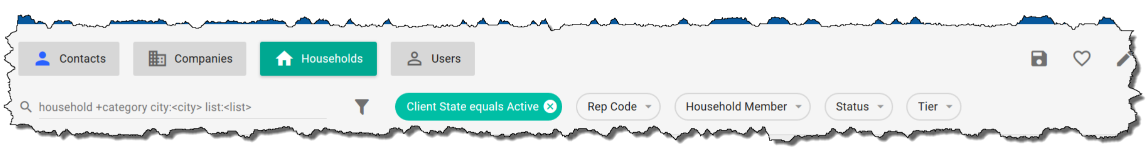
Entity management enhancements

The NexJ CRM entity management functionality has been enhanced.

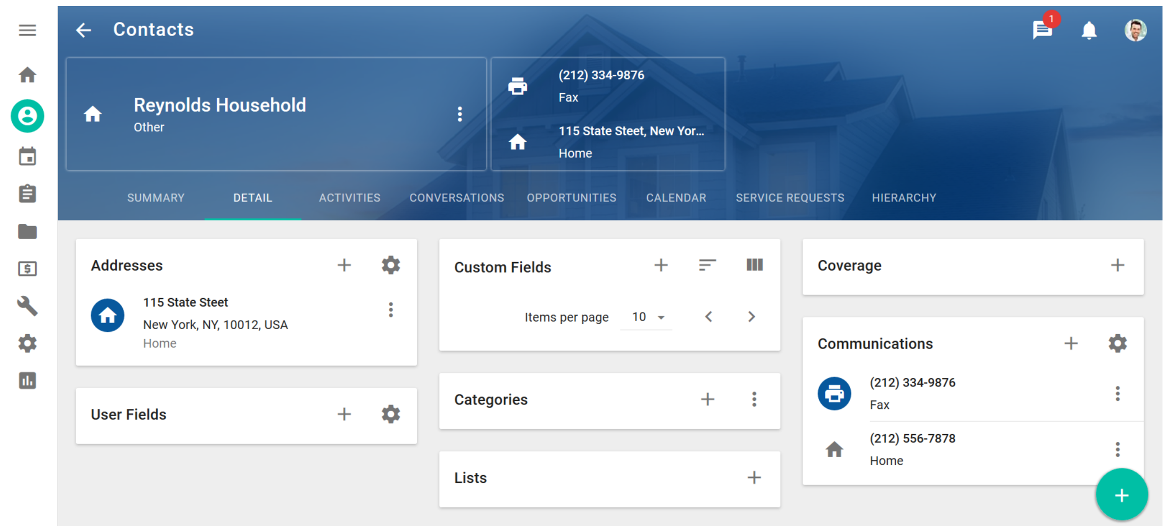
Managing households

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

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



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



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

Process Management form enhancements

This release includes the following enhancements to Process Management forms.

Ability to suppress conflict warning messages

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

For more information about bypassing conflict warning messages after a form upgrade, see (9.4) Developing Process Management forms.

Creating advisory and hold notes for entities

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

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

Creating client KYC information

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

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

Reporting enhancements

This release includes the following enhancements to the reporting functionality.

Scheduling reports

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

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

Creating dashboards based on templates

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

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

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

Report objects are linked to details data

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

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

Sharing report exports by email

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

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

Exporting ad hoc report visualizations

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

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

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

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

NexJ Admin Console enhancements

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

Batch resetting folders states for Exchange users

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

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

For more information about resetting folder states, see (9.4) Resetting folder states for Exchange Server policy changes.

Including Exchange events in application server logs

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

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

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

Application development enhancements

This release includes enhancements to application development functionality.

Using Content Assist for Scheme

Content Assist, which is the contextual list of available functions and variables which can be displayed for Scheme scripts in NexJ Studio, has been improved. For more information about Content Assist, see (9.4) Scheme.

New features delivered in 9.2.3

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

Application development enhancements

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

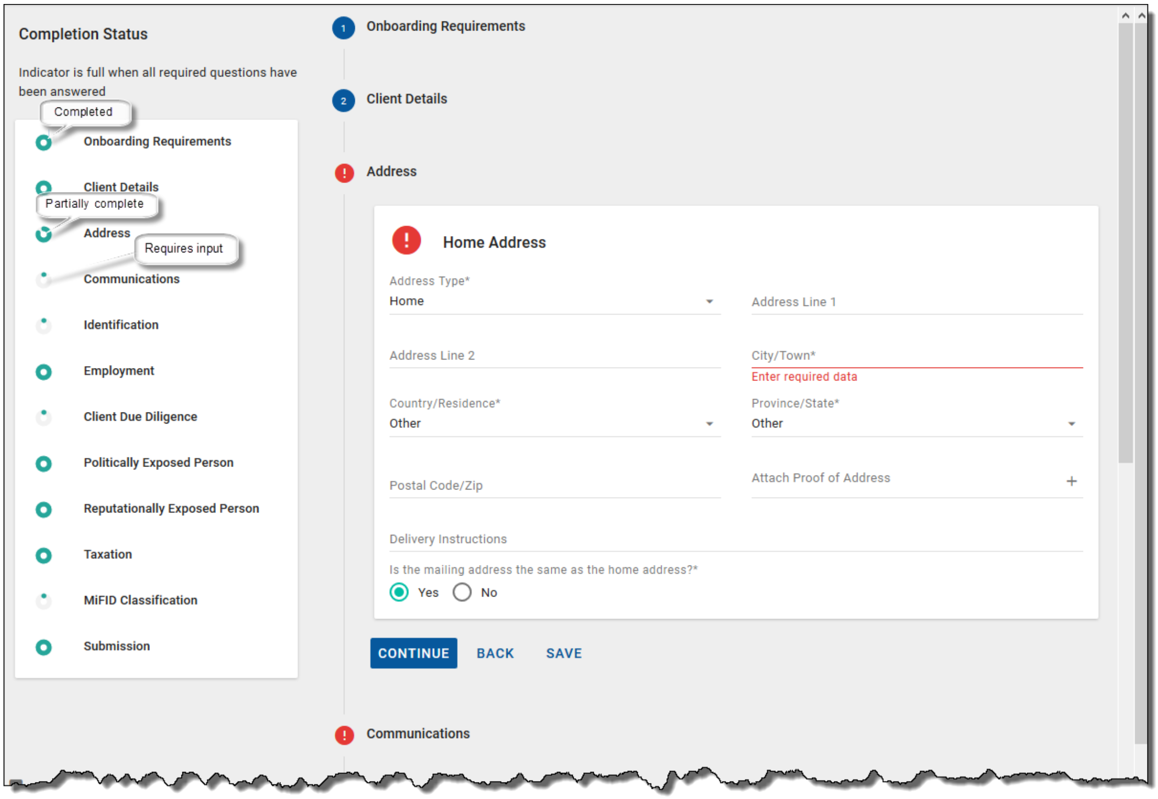
For more information, see (9.4) Launching NexJ CRM dialogs from third-party applications.

New features delivered in 9.2.2

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

Process Management form enhancements

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



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

Reporting enhancements

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

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

Administrators can assign privileges to define the level of access individual users have to the ad hoc reporting functionality. For more information, see (9.4) NexJ CRM privileges.

The enhanced ad hoc reports can run on a standalone server or on the same server as NexJ CRM, depending on your configuration. For more information, see (9.4) Setting up ad hoc reporting.

Developers can seed in public reports, customize report template names and descriptions, and create and extend subject areas for ad hoc reports. For more information, see (9.4) Ad hoc reports development.

New features delivered in 9.2.0

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

NexJ CRM user experience enhancements

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

The UI provides the following benefits:

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

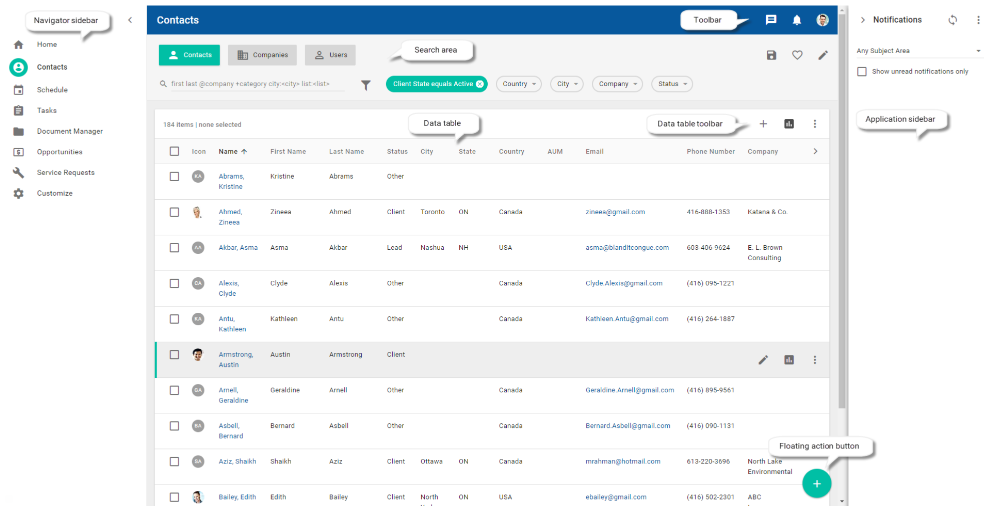
For this first release of this new UI, the following function points are available:

- Contacts and companies record creation and editing
- Activities, tasks, and schedule management
- Notifications that alert you to information changes in NexJ CRM
- Conversations for exchanging messages between users
- Document Manager for storing and organizing documents
- Opportunities for tracking specific products or services that create further upselling opportunities
- Email-to-Service-Request for automatic creation of service requests based on incoming customer emails
- Service request creation and editing
- Customize workspace for business administrators to configure categories, custom fields, coverage groups, and so on
- Predefined reports that display information from specific workspaces
- Business processes for change approvals

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

Floating action button, sidebars, cards, and data tables

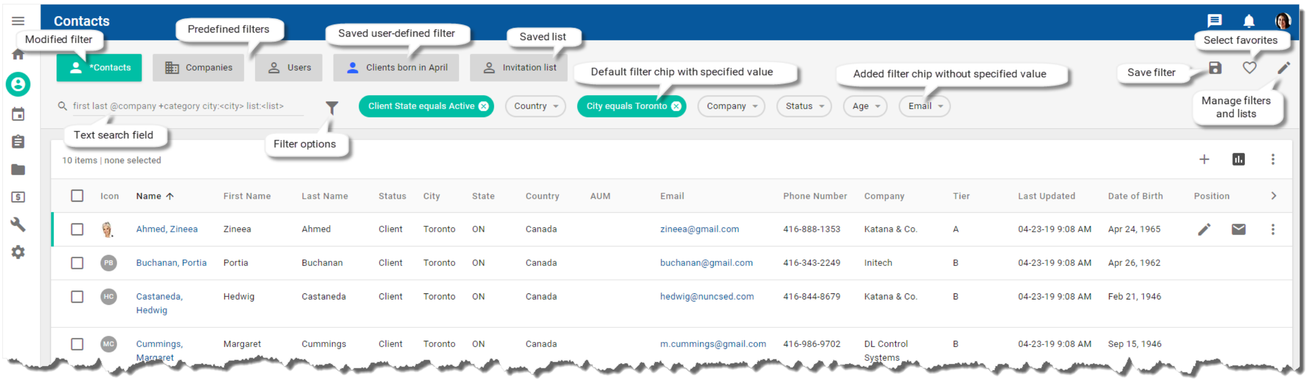
The 9.2.0.0 UI includes a floating action button, sidebars, cards, and data tables. The floating action button enables you to quickly access the most common functionality for a workspace or the application.



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

Searching and filtering

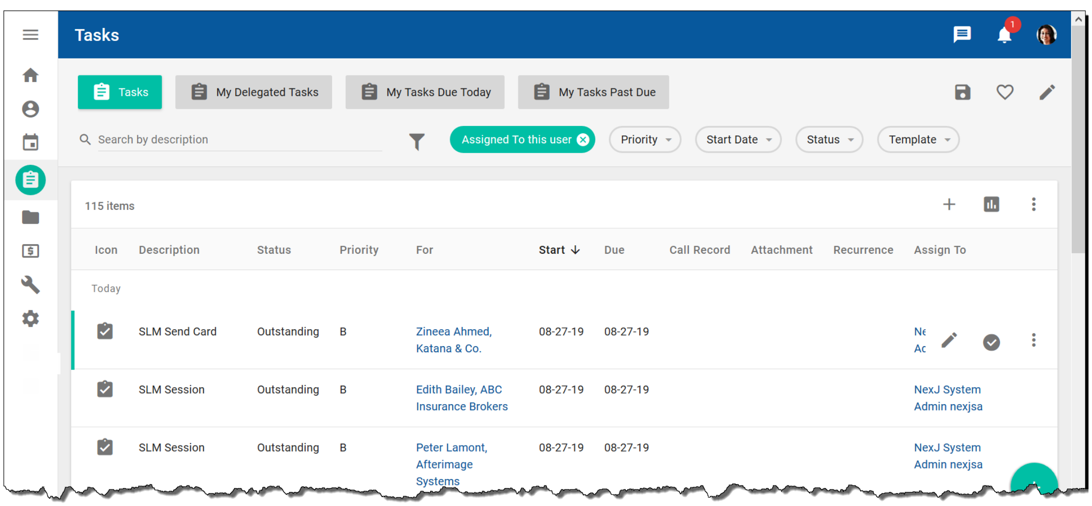
This release includes enhancements to the searching and filtering functionality. You can use predefined filters to find records quickly that match the filter criteria based on the workspace subject area. You can create and save user-defined filters by combining predefined filters with your own additional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



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

New Tasks workspace

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



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

Push notification information enhancements

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

- Starting

- Connecting
- Stopped
- Polling
- Running
- Retrying

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

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

NexJ Admin Console enhancements

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

For more information, see Enabling user options .

NexJ System Admin Console enhancements

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

Application development enhancements

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

Data compression enabled out-of-the-box

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

For more information, see Creating a new environment file.

NexJ Studio project linter for Scheme code

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

For more information about the NexJ linter mixin, see Linting Scheme code in NexJ Studio projects[1].

NexJ Studio support for JavaScript

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

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

For more information about using JavaScript in NexJ Studio, see (9.4) Using JavaScript and Using the Minimal Console.

Ability to enable and disable concurrent metadata loading

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

Improved interface development functionality

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

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

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

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

Simplified specification

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

Efficient development

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

Performance improvements

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

UI automated testing

You can now record and play back UI testing scripts using Selenium WebDriver[2].

Monitor application with Grafana dashboards

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

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

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

Resolved issues

Version 9.4.13.0

CRM-3911

In order to aid in troubleshooting, when a malformed XML payload is encountered through a streaming connection with MS Exchange, the payload will now be written to the system out log as a WARN level, rather than DEBUG.

CRM-3751

Fixed a bug where "Basic" authentication method did not take effect for an HTTP channel when the server was deployed with a Custom authentication method.

Version 9.4.12.0

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 9.4.6.0

ECRM-30682

Previously, when users created an activity in the classic UI and the calendar portlet was open in the background, the calendar portlet took focus and forced its way to the front, regardless of where the focus was when the activity was created. This issue has been resolved.

Version 9.4.5.0

ECRM-30483

As issue that caused a NJ_Session.PK duplicate key exception to be thrown in the application log files has been resolved.

Version 9.4.3.0

ECRM-30253

An issue that caused the `defaultTime` property to be ignored for datetime fields in the classic UI has been resolved.

ECRM-30369

An issue that caused the dashboard to hang when you performed a batch action for multiple calendar items has been resolved.

Version 9.4.2.0

ECRM-30042

Changes have been made to reduce or eliminate the likelihood of processing errors if a reminder dialog is left open for a significant period of time (10+ minutes) before being dismissed.

ECRM-30192

Previously, when you made a change to the country field and changes to address fields, the changes to the address fields were not saved. This issue has been resolved.

ECRM-30203

An issue that caused dialogs in the classic UI to remain open in the Google Chrome browser when you tried to close them has been resolved.

Version 9.4.0.2

AFL-5194

An issue that meant that you could not navigate to an instance from a link in a JasperReports Server report has been resolved.

AFL-5406

Previously, when you added an event to a top level tool in the portal metadata, and defined the corresponding UIAction in a Broker portlet, the event was not fired. This issue has been resolved.

Version 9.4.1.0

CDM-3842

Previously, when you clicked the **Share Report** button, an empty notification message was displayed. This issue has been resolved.

CDM-3867

Previously, you were unable to use the Aging Open Deals ad hoc report in a dashboard. This issue has been resolved.

CDM-3925

Previously, when you created a new Deals report, selected the **Visualization** tab, cleared **Add Grouping**, clicked **Add Y-Axis**,and selected **Count of All Deals**, the related data did not display in the chart. This issue has been resolved.

CDM-3931

Previously, when you edited an ad hoc report you could not modify filters that used operators. This issue has been resolved.

CDM-3984

Previously, and during a reseed, a null pointer exception was caused by disabling a subject area (enabled="false") using a reporting augment. This issue has been resolved.

Version 9.4.0.1

ECRM-30012

An issue that caused a checksum mismatch after you started a 9.X build, deployed using IBM WebSphere, has been resolved.

Version 9.4.0.0

AFL-3254

Previously, the buttons width exceeded the warning dialog width when you deleted a meeting with multiple **Assign To** users in another user's calendar on the Schedule workspace, edited or deleted a recurring schedule item in another user's calendar, or added a user coverage group to a contact in the **Detail** tab. This issue has been resolved.

AFL-3544

An issue that meant that you could not add and edit notes and resolution comments for service requests in the **Detail** tab has been resolved.

AFL-4368

Previously, when you had a filter chip with a custom field enabled on the Contacts workspace, and you created a new custom field from a contact's **Detail** tab (with a different name than the existing custom field), added it to the contact, and navigated back to the Contacts data table, the new filter chip displayed the pre-existing custom field's name. This issue has been resolved.

AFL-4718

An issue that caused the **Show available actions** floating action button for performance statistics not to work for independent dialogs has been resolved.

AFL-4739

An issue that meant when you accessed a contact's record from a direct link or a third-party application, the default contact for a task or schedule item was not set appropriately has been resolved.

AFL-4799

Previously, when you opened a New Interaction dialog, opened the Select entities dialog from the **For** field, selected the Companies filter, searched for and added a company, closed the Select entities dialog and reopened it, your search was not reset. This issue has been resolved.

AFL-4802

Previously, when you navigated to any workspace with filters, clicked the **Filter options** button , selected the **Add filter fields** menu option, selected **Unselect all** to clear filter field selections, entered search criteria in the **Search by filter** field, and selected **Select All**, all of the options were selected instead of only the filtered results. This issue has been resolved.

AFL-4824

Previously, on the Contacts workspace, when you filtered entity data using the State filter chip you received unexpected and inconsistent results. This issue has been resolved.

AFL-4829

An issue that meant that you could not double-click on a row in the data table on the Tasks workspace to open the Edit dialog has been resolved.

AFL-4845

Previously, when you used the text name search in the **Assign To** field for a task, the search used a prefix search to return values that started with certain letters instead of a search that found values that contained certain letters. This issue has been resolved.

AFL-4847

An issue that meant when you used Safari on iOS, two taps were required when attempting to use a hyperlink within a data table has been resolved. For touch-enabled devices, the row toolbar for data tables has been reduced to include one **More Actions** button ⋮ on each row, where you can select options.

AFL-4852

Previously, when you had multiple alarms displaying in a Reminders dialog, you changed the snooze settings for the alarms, and clicked the **Snooze** button for one alarm, all alarms reverted back to their default settings. This issue has been resolved.

AFL-4884

An issue that meant when you used the Country filter chip on the Contacts workspace, the list of countries was not sorted alphabetically has been resolved.

AFL-4933

Previously, when you navigated to the Contacts workspace, selected multiple contacts, clicked the **More Actions** button ⋮ , and selected **Update > Custom Field** to perform a batch update on a currency **Custom Field**, you were not allowed to input a value. This issue has been resolved.

AFL-4948

An issue that meant when the Hierarchical Access Model was enabled, you were unable to filter using a division, subfirm, or branch has been resolved.

AFL-4949

Previously, you were unable to filter contacts using User Fields filter chips. This issue has been resolved.

AFL-4974

An issue that meant that you were not successfully directed to another tab within the same workspace because a UI event was not invoked has been resolved.

AFL-5030

An issue that meant that links for names on the Customize workspace were not clickable has been resolved.

AFL-5043

An issue that meant your client session was not cleared when you closed your browser has been resolved.

AFL-5064

An issue reading parameters in the range input control has been resolved.

AFL-5073

An issue that meant that the Classification permission field was missing when email was saved from Microsoft Outlook, and when the user opened it in NexJ CRM, has been resolved.

AFL-5088

An issue that caused the visibility of some menu items to not dynamically update when conditions changed has been resolved.

AFL-5163

Previously, when you added a custom field for a selected contact in the **Detail** tab on the Contacts workspace, and clicked on an entity name in the Select an entity dialog to select it, the selection in the dialog was not highlighted as expected. This issue has been resolved.

CDM-3338

An issue that meant that when an environment's database schema was recreated and deployed with the bireport flag enabled (`meta.bireport.enabled=true` in the development environment file), and then re-deployed with the bireport flag disabled, the server generated an error in the finance instance console, has been resolved.

CDM-3379

An issue that meant that on the Reports workspace, if you created a report, clicked on the **Select** button + to add a field, selected any checkbox, and used the keyboard to add any character, the **Add Fields** typeahead field on the parent window was still accessible even though a child dialog was open, has been resolved.

CPM-490

An issue where an entity to which a user did not have access was being pre-populated, has been resolved. While the dialog shows entities that the user cannot see, when the dialog opens, the entity that the user cannot see will not be displayed. The selected count will show as **1 selected**, but there will be no checkmark on any of the entities as the selected entity is hidden in the dialog.

CPM-634

An issue that meant that when you used Process Management forms, and a MM picker value was calculated using the value formula from another field, the user interface would not refresh has been resolved.

ECRM-27843

An issue with the Apache Avro message formatter where messages namespaced by colons would generate errors has been resolved.

ECRM-29621

An issue that caused a Recurrence.testSeriesRangeUI unit test failure related to the Daylight Savings Time change period has been resolved.

ECRM-29660

An issue in which errors in recovering messages led to a semaphore leak, and performance degradation, has been fixed.

ECRM-29701

The use of the space character is now supported when you use Windows batch scripts to specify the JAVA_HOME path for the Push Redirector.

ECRM-29759

Issues caused by changes included with Google Chrome version 80 and later, and that prevent the user state from being saved as intended when the user closes or navigates away from a particular page, have been resolved.

ECRM-29774

An issue that caused Apache Ant calls failure for `build.xml` during deployment for the `websphere.config` target, when you are using Java 1.8, has been resolved.

ECRM-29783

Default SMTP timeouts including connectionTimeout, readTimeout, and writeTimeout have been added to the mail channel to avoid threads hanging when sending mail.

ECRM-29806

The jTDS drivers in this release have been patched with a fix from jTDS 1.2.3. This patch addresses an infinite loop condition that can occur if a database connection dies during a batch job.

ECRM-29898

An issue that caused an SQL deadlock when executing a batch update has been resolved.

Version 9.3.0.1

AFL-4975

An issue that generated a UI error when you attempted to load a workspace, which was associated with a service persisted class, has been resolved.

AFL-5005

A refresh issue that prevented the entity banner from being updated when switching between items within a workspace has been resolved.

AFL-5022

An issue that caused validation logic to be applied in the UI, even when the corresponding dependency was discharged, has been resolved.

Version 9.3.0.0

AFL-1172

An issue that caused data table columns to be completely hidden when you resized the NexJ CRM user interface because the right and left chevron buttons in the header row for a data table could become hidden has been resolved.

AFL-3399

The Business Phone Number column in the Contacts data table is now named correctly.

AFL-3595

The ability for end users to change the time zone for their activities is supported.

AFL-3730

An issue where sluggish performance would be observed upon performing a multi-select operation has been addressed by constraining the selection limit to 1000 records by default. The contacts multi-select limit is further reduced to 300 records within pickers.

AFL-3868

An issue that caused the table carousel to be completely hidden when you resized the NexJ CRM user interface has been resolved.

AFL-3961

Prior to this release, when you clicked a filter chip to select the values you wanted to filter by, for example, when you clicked the Company filter chip on the Contacts workspace, values longer than a certain character limit appeared cut off and no tooltip was displayed to assist with the selection. This issue has been resolved.

AFL-3969

Prior to this release, the **Status** field was visible in filters and dialogs related to service requests, even when the email-to-service-request functionality was not enabled. This issue has been resolved.

AFL-4015

An issue that caused the application to drill down to the contact detail but the menu to continue to display, when you used an Apple iPhone to access NexJ CRM, tapped a **More Actions** menu, and tapped the name of an entity below the menu, has been resolved.

AFL-4123

Prior to this release, when an activity template was deactivated, an Information icon to indicate the deactivation was missing. This issue has now been resolved.

AFL-4223

Prior to this release, when you had a parent company that had child companies, the **Hierarchy** tab on the Contacts workspace did not display the parent company's child companies correctly. This issue has been resolved.

AFL-4283

An issue that caused an error to be thrown when you clicked the **Manage filters and lists** button, clicked the **Add Filter or List** button +, and added your filter or list information has been resolved.

AFL-4287

Prior to this release, when a large value, such as 16387264983275494356, was entered in a field expecting an integer value, validation might not take place and an unexpected error might display. This issue has been resolved.

AFL-4311

Previously, when you added position information to a contact's **Company** field, it was not visible in the **Hierarchy** tab. This has been resolved.

AFL-4367

Prior to this release, filtering the Contacts data table by a custom field that only allowed quick picks did not retrieve results even if matching records exist. This issue has been resolved.

AFL-4377

Prior to this release, when creating a schedule item, if you created another schedule item, task, or document from the **Related** tab of the schedule item, and then added another related item to the first related item, changes to all the three items were saved when you clicked **OK** in the lowest nested dialog, before you clicked **OK** in the parent dialog. This issue has been resolved.

AFL-4426

Prior to this release, if you had access to a contact but not to the company they were associated with, adding that contact to the **For** field of an activity resulted in an unexpected error when you tried to save the change. This issue has been resolved.

AFL-4439

Prior to this release, captions exceeding 20 characters in multi-selection pickers were truncated and shown with an ellipsis appended at the end. This issue has been resolved.

AFL-4452

An issue that caused an unexpected error when you opened a dialog (for example, when you edited a task), closed it without making any changes, and then performed subsequent actions (for example, deleted the task or marked it complete), has been resolved.

AFL-4475

When assigning all users to a task on the Tasks workspace, not all the users' pictures were displaying. This has been resolved.

AFL-4493

Prior to this release, when a user clicked the **Snooze** button, the Reminder dialog sometimes reopened immediately, or did not appear to close. This happened if the clocks of the client workstation and the servers got out of sync with each other by a number of minutes. This issue has been resolved.

AFL-4495

An issue that enabled you to double-click on data tables rows to view read-only fields in the Edit dialog in some cases but not in others, and caused inconsistent availability of the **Edit** button has been resolved.

AFL-4500

An issue where the incorrect header was displaying for the Edit List and Edit Filter dialogs has been resolved.

AFL-4514

An issue that enabled end users to remove default filter chips in the Select filter fields dialog has been resolved.

AFL-4558

An issue that caused duplicate list queries from the navigator table on the Opportunities, Tasks, and Service Requests workspaces has been resolved.

AFL-4571

An issue that caused NexJ CRM to become unresponsive when you clicked the **Manage filters and lists** button on the Contacts workspace, closed the Filters and lists page, and attempted to navigate to a different workspace has been resolved.

AFL-4602

Prior to this release, when users created a filter chip for a string filter field, the `starts with` and `ends with` filter operators did not display for selection. This issue has been resolved.

AFL-4603

Browser-based spell check is now supported. For example, if you have configured Google Chrome to enable enhanced spell check, your browser identifies spelling errors, and you can right-click on misspelled words, and choose corrections from a browser supplied list.

AFL-4637

Prior to this release, if you used Google Chrome as your browser, and you navigated to the Contacts, Opportunities, or Service Requests workspaces, added filter chips, and lowered the resolution of your browser, the captions might not display in the Select filter fields dialog. This issue has been resolved.

AFL-4649

Previously, when selecting a client in the **For** field of an Opportunity and attempting to use type-ahead functionality, you could only access the first 10 items of the candidate list. Now, when you type a letter in the field and there are more than nine responses, there is a **More** option. Clicking on **More** opens a multiple selection dialog.

AFL-4682

An issue that caused the end time for a daily recurring schedule item to propagate incorrectly near the end of the month when you selected **after** and entered 1 day in the **End Time** field in the **Recurrence** tab, and navigated to the **Detail** tab to view the **End Date** field, has been resolved.

AFL-4698

Prior to this release, an issue caused the default contact icon to display for companies that didn't have an image in the **For** field picker in the New Task dialog. This issue has been resolved.

AFL-4699

An issue that caused the filter field change event to be called unnecessarily when you clicked on the **Filter Options** button, selected the **Add filter fields** menu option, added all available filter fields, and switched between filters on the Contacts workspace, has been resolved.

AFL-4701

An issue that generated an error because decimal numbers were rounding incorrectly in the **Expected Amount** field in the New Parent Opportunity dialog has been resolved.

AFL-4703

An issue that caused NexJ CRM to round to the next month, when you used the `(date-add 'month)` function, and you started with a timestamp of the last day of the month, has been resolved.

AFL-4720

Prior to this release, when you selected a view other than today on the Schedule workspace, and then selected the **Today** menu option, the calendar didn't change to display today's schedule. This issue has been resolved.

AFL-4723

Prior to this release, if a user's time zone was sufficiently offset from that of the application server, then when a coverage group was added to a contact, the start dates associated with corresponding users were different by a day. This issue has been resolved.

AFL-4759

In an entity's banner, the full physical address can now be viewed without having to hover it.

AFL-4766

Prior to this release, you were unable to search for contacts by first name or last name in the text search field on the Contacts workspace. This issue has been resolved and full name search is no longer available. Searches using wildcards are still supported.

AFL-4784

Users can now successfully dismiss all alarms by clicking the **Dismiss All** button.

AFL-4791

An issue with the **For** field not updating to the current entity after navigating to the entity through the **Hierarchy** tab has been resolved.

AFL-4797

An issue where the **For** field filter on the Tasks workspace was a single selection dialog rather than a multiple selection dialog, has been resolved.

AFL-4801

Prior to this release, if you were granted the AuditLogView privilege that made the **Audit** tab visible to you, you created a new contact, and edited the contact's **Tier** field, an unexpected error was thrown. This issue has been resolved.

AFL-4822

Prior to this release, when you added a parent or product opportunity on the Opportunities workspace, you added a coverage group to the Team card, and then you attempted to delete the coverage group by clicking **Remove Coverage Group**, a scripting error was thrown. This issue has been resolved.

CPM-588

An issue where `Set!` in the `onSubmit` caused an unexpected error at compilation, has been resolved.

CPM-608

An issue where "Not visible" was displaying in the **For** field of an Advisory note rather than the contact's name, has been resolved.

ECRM-29051

Prior to this release, when you created a new augment for an existing class using NexJ Studio, created a static event for the augment, and referenced the event in the class, for which the augment was created, NexJ Studio exhibited the following behaviors:

- If you used the class name of the augment to call the event, no validation error was generated but the run-time code failed.
- If you called the event with the original class name, the script editor threw an error, there was no run-time error but a framework validation error was generated.

This issue has been resolved.

ECRM-29080

An issue that caused NexJ CRM to freeze and generate an error, when you selected a report type on the Contacts workspace using Mozilla Firefox version 67, has been resolved.

ECRM-29082

An issue that caused the application data to not load in parallel in your development environment, when you set the `concurrentLoadingEnabled` property to `true` in an environment file, has been resolved.

ECRM-29246

The JavaScript parser has been fixed to allow instance attributes of an object to be set.

ECRM-29378

An issue that caused errors when you performed multiple "Reload All" metadata hotswaps in NexJ Studio and refreshed NexJ CRM has been resolved.

ECRM-29529

In order to reduce the potential for startup failures, the default heap size for the NexJ Push Redirector has been changed to 1024 MB.

ECRM-29570

An issue that caused an update on a proxy class with service persistence to return an RPC response with old values has been resolved.

Version 9.2.3.0

AFL-3748

Prior to this release, for deployments using the Hierarchical Access Model for security, users with delegated access could not create a schedule item and then later select the **Restrict access to users in the Assign To** option. This issue has now been resolved.

AFL-4652

When a user starts creating a new contact or activity and then closes the dialog before saving, they will now receive a confirmation message that all the information entered so far in the dialog will be lost.

Version 9.2.2.0

AFL-4509

An issue that caused extra white space to display below the Schedules user list on the Schedule workspace when you resized your browser has been resolved.

AFL-4510

An issue that caused the target page to appear with an undesirable offset when a stepper was embedded in a portal application has been resolved.

Version 9.2.1.0

AFL-4579

An issue that prevented you from adding any additional filter chips to filters, which leverage custom logic for filter chip initialization, has been resolved.

Version 9.2.0.0

AFL-4205

Prior to this release, when you created a follow-up task from an existing activity's **Related** tab, it was assigned to you by default, regardless of how that task type was configured on the **Customize** workspace. This issue has been resolved.

AFL-4226

Prior to this release, if you added a note to an entity record with the edit security set to private, other users were able to add attachments to the note, effectively editing the note. This issue has been resolved.

CDM-3296

An issue that meant that, when you edited a dashboard on the Reports workspace, report titles did not display as expected has been resolved.

Known issues and workarounds

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

Process Management

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

CPM-554

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

CPM-696

When a Process Management form has a checkbox that is configured to have required user input, a validation error is not thrown when you edit the checkbox by selecting and clearing it.

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-2999

When you change the activity template associated with a task, the **Status** drop-down in the New Task or Edit Task dialog continues to display the statuses applicable to the previous activity template.

AFL-3042

In the Select a custom field type dialog, if you click the **Add** button to add a new custom field and select the **Allow Quick Picks Only** checkbox, you are not prompted to add the quick picks before saving the custom field. Because the new custom field only allows quick picks but does not have quick picks configured, the field cannot have a value.

AFL-3058

On the Document Manager workspace, documents appear to have hyperlinks and, therefore, seem clickable when they, in fact, are not.

AFL-3138

When you perform all of the following actions, existing selections can be chosen, and an error message is displayed:

1. Add multiple categories for a contact such that the **More** button displays on the Categories card in the **Detail** tab.
2. Toggle **More** and **Less** buttons.
3. Attempt to add an additional category.

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-3282

When you try to delete a product from a parent opportunity or a product opportunity, the confirmation message displayed is not user friendly.

AFL-3289

When adding categories, custom fields, or lists to a contact using batch processes, the categories, custom fields, or lists that are already added to the contact are not pre-selected in the dialog. If you add the same values again and click **OK**, an error message displays, but it does not indicate the reason the change could not be saved.

AFL-3320

When filtering on birthdays on the Contacts workspace, relative day operators are not supported.

Workaround:
Use the between operator instead by providing boundaries for a date interval.

AFL-3416

When you batch update the tier for a large number of contacts, the Tier column in the Contacts data table may not automatically refresh as expected.

Workaround:
Manually refresh the browser to confirm the tier has been updated.

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-3554

If a contact's **Activities** tab shows activities starting in various time periods, such as Future, Today, Last Week, This Week, and so on, when you scroll down the list of activities and click on an activity, the selection moves upwards instead of remaining on the clicked activity.

AFL-3583

On the Contacts workspace, when creating a filter or a list, if the description that you enter exceeds the supported character limit, the error that displays when you try to save the change does not indicate the actual issue.

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-3676

If a contact's rep code is changed by one user while another user has the contact's profile open, that user may experience some unexpected behaviour when viewing the contact's profile.

Workaround:
Navigate away from the contact's profile.

AFL-3723

Dates display in the UK format in the My Tasks card on the Home workspace even if the US format is selected in the user preferences.

AFL-3742

The **View Access** tab in the Set Permissions dialog on the Schedule workspace does not display text indicating the purpose of the tab. You can use this tab to grant view access to your schedule to specific users while restricting it for all other users.

> Your administrator must have granted you the required privileges for you to be able to set permissions including view access.

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-3942

When you batch add documents to more entities than the asynchronous threshold set for the Add Document batch process, the notification displayed when the batch process is completed includes the date of the completion in the UK format, even if you have selected the US format in your user preferences.

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-4087

When using Internet Explorer, the layout of the Files Ready to Download dialog, which you can access by selecting **User settings** > **Files** in the navigation toolbar, may require scrolling to view all information. The layout is as expected in other supported browsers.

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-4133

You may be able to create a new category or add a category to an entity even if that entity type is not supported for that category group.

AFL-4196

If the current date occurs in a leap year (for example, February 29, 2020), you navigate to the Schedule workspace, display the calendar for the current date, click on the date at the top of the main calendar, and select a different year (for example, 2021), the date does not change as expected, which means the calendar does not change.

AFL-4199

If you edit a single instance of an all-day recurring meeting, and move the start date to be later than the end date without also changing the end date, the meeting instance may be removed.
Workaround:
When editing a single instance of an all-day recurring meeting, be sure to update both the start and end date before saving your change.

AFL-4221

You cannot add a user to a contact's coverage more than once with the same coverage role. This results in the following error message: "Client Coverage violates a uniqueness constraint on userPerson, coverageRole, entity."

Workaround:
Validate that the user is not already included in a coverage group for that contact with the same coverage role. Add the user with a different coverage role as required.

AFL-4229

After you select a contact on the Contacts workspace, the Contacts heading on the details page becomes a hyperlink but clicking on the hyperlink does nothing.

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-4419

When you select an entity and create a new list to add the entity to, the **Type** drop-down in the New List dialog includes irrelevant list types. For example, you should only be able to add a contact to a list of type **Contacts** or **Mixed**, but when you select a contact and create a new list, the **Type** drop-down also displays **Companies** and **Users**.

AFL-4440

If you add another user to the **Assign to** field for a schedule item and send the invite, and if the user declines the invite or marks themselves tentative, when you open the schedule item, the user's name displays with a red exclamation mark.

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-4713

When you create a daily recurring meeting series on the Schedule workspace that spans the Daylight Savings Time rollback, the meeting is not created for that rollback date.

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-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-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-5004

You are not informed that a nested child dialog is invalid until the parent dialog is closed.

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-5041

The vertical height of the entity banner is not updated immediately when corresponding new data is added. It is updated with a browser refresh or by switching to a new record.

AFL-5075

When you reduce the size of your browser window, the navigation sidebar for NexJ CRM exhibits inconsistent behavior.

AFL-5105

Switching quickly between filters may result in the display of data from an unselected filter.

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-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-5207

When you navigate to the **Detail** tab for a contact on the Contacts workspace, and provide country, city, and state address information on the Addresses card, and save this information, the address information is not displayed in the entity banner.

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-5454

The North American area code 672 is not currently recognized as valid by the CRM system.

AFL-5488

If a filter card makes use of an Assign To picker, then, occasionally, when a user opens the control, it will be empty.

Workaround:
Close the filter card and re-open it, or press Enter. This should refresh the contents.

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-29278

Boolean values in the **Audit Trail** tab for activities, batch emails, business processes, entities, opportunities, and service requests display as 0 or 1 instead of displaying as a respective value associated with an attribute.

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-29804

The unit property for the timestamp for saved filter rules is expected to influence the time zone for the persistence of a timestamp. When the value is set to unit="unit", the timestamp is erroneously persisting for Coordinated Universal Time (UTC) midnight instead of local midnight.

Workaround:
Change the unit property to unit="UTC".

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.

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.

AFL-4230

In the Contact workspace, if you add a single entity to your `My sync list` list by using the **Add to > List** action available from the row the entity displays on, it will not properly synchronize with Microsoft Outlook.
Workaround:
Select the entity or multiple entities that you want to add to the list, and then use the Add to > List action available from banner of the entity list.

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.

Reporting and analytics

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

> **Info**
>
> Known issues related to reporting functionality that uses the NexJ Reporting Engine are documented in the NexJ Reporting Engine release notes document.

Ad hoc reporting

CDM-2922

If you apply a filter on a subfield of a collection-type, associated field in an ad hoc report and use that field as a grouping, the **Summary** and **Visualization** tabs of the report may display more items than expected. This issue primarily impacts time-based attributes, such as the end time of related activities in a Users report.

> The issue only impacts aggregations and, therefore, does not affect the **Live Detail** tab, which shows the filtered data correctly.

CDM-3372

A Mozilla Firefox browser error is generated when a user navigates to the Reports workspace.

CDM-3378

The reporting functionality is currently not supported in non-Google Chrome browsers.

CDM-3403

After you trigger a report to be executed, the **Update Report** button is grayed 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-4043

The emails sent out by a scheduled run of a report may not always have the details of the report attached in a .csv file.

Workaround:
If this happens, you may need to export the report data manually and send it as required.

Predefined reporting

AFL-5180

When you click the **Reports** button on the Contacts workspace, select **Detail Report**, select **Show Interactions** and **Interaction filter options**, select a different status and a different template in the **Type** field, and click **Run Report**, you may receive an error or the report may not generate.

Mobile

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

AFL-2678

The ability to select a year in date-type fields is missing on iOS devices.

AFL-3075

When you try to run a contact report on an iOS device, an error displays and the report is not generated.

AFL-4729

When you are using an iPhone, you are unable to paste text into the rich text editor, such as when sending a batch email.

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-5158

The right-click menu for Schedule workspace items is not available on mobile devices.

AFL-5205

When attempting to create a schedule item on a mobile device that is running Chrome, you may be unable to set the start date.

AFL-5298

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

Admin

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

AFL-3556

In the **Stages** tab of the Edit Opportunity Template dialog, the **Edit** button is erroneously enabled for users without administrative privileges. Any changes made to the stages are not saved.

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.

ECRM-29209

If you have selected **Pre-Populate** for an address type in NexJ Admin Console, and you add a contact in NexJ CRM, then the address type is added to the Addresses card in the **Detail** tab for the contact. However, if you have pre-populated a communication type in NexJ Admin Console, NexJ CRM does not add the communication type in the Communications card when you add a contact.

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-29580

NexJ CRM does not currently support the customization of screens, toolbars, and portlets by business administrators using the Personalization page in NexJ Admin Console.

Technology

This section describes known issues that pertain to the application framework.

AFL-3723, **AFL-3942**

Some dates in NexJ CRM, including those in activity audit trails and notifications, display according to the locale the server is deployed with, regardless of the user's browser language. This only impacts users whose browser language is different from the locale the server is deployed with.

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.

ECRM-28768

When dump logging is enabled for the REST HTTP server, a large spike in memory usage may occur. NexJ recommends that you do not use REST with dump logging enabled.

ECRM-29013

In the NexJ Studio Presentation layer, the controls shown for a layout in the **Layout** tab do not automatically display in the Outline view.

ECRM-29146

When you run the `pushrd.sh` script to start the push redirector in a Linux environment that is running Java 8 or higher, a warning message is generated that states that an illegal reflective access operation has occurred.

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-29511

When you perform a metadata upgrade to a new version of finance, there is an issue with the .workspace file and other files that causes certain icon codes to be changed.

Workaround:
If you are working on a project that is using metadata from a 9.X release, select the **Compare Source** menu option when reconciling code conflicts in NexJ Studio.

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-29893

The Database Schema Tool in NexJ Studio generates mismatched versions and namespaces in SQL upgrade scripts for mixin data sources.

ECRM-29964

The JVM property "com.ibm.jsse2.overrideDefaultTLS" mest 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

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