Nexsure 1.0.025 Release Notes
Tuesday, October 21, 2003

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These notes are continuously updated. Please check periodically for new information. "#" indicates new information in this version of the release notes.

For more information about Nexsure see online help or contact an XDTI representative.

Contents Include:

Purpose of Release Notes

This document is a summary of information about Nexsure 1.0.025, including operational requirements, known issues, resolved issues and contact information.

Welcome to Nexsure

Nexsure, developed by XDimensional Technologies, is a comprehensive and intuitive web-architected agency management solution. The only product of its kind, Nexsure has been engineered for the web from the ground up, and is based completely on the Microsoft technology platform and takes full advantage of the XML data format. Nexsure offers the sophisticated features and functions that insurance professionals have not found in traditional management system offerings. These advanced features translate into a more efficient agency workflow and a superior service experience for their clients.

With no requirement other than an Internet connection, Nexsure liberates the professional agency system from the burdens and costs associated with traditional agency management products and offers the ultimate flexibility for remote offices and/or telecommuters. More importantly, Nexsure provides opportunities for carrier system interoperability, collaborative data gathering, and consumer "engagement" that traditional systems simply cannot match.

Nexsure also alleviates the perpetual and overwhelming upgrade and administration demands of managing an in-house agency network. Nexsure has been deployed via XDimensional Technologies state-of-the-art ASPN Data Center, located in Brea, California. ASPN removes the burden of maintaining an in-house network for your agency management system by eliminating the need for a server and network at your agency. Nexsure is the first ASP-deployed / web-architected application, based on Microsoft® technologies, to be offered to insurance agencies as their agency management solution. When deployed in this fashion, it represents an extremely efficient and cost effective solution whereby agencies can access their system anywhere, any time, and from virtually any PC.

Client Requirements

Nexsure was created to leverage the capabilities of Microsoft's latest released products. Please refer to the Microsoft site for specific hardware requirements of their products.

Minimum system requirements (for CRM / policy use) Windows 98 or higher with Internet Explorer 5.5 or higher.

Refer to Microsoft hardware requirements, Personal Computer with 133 MHz or higher Pentium-compatible CPU. 32 megabytes (MB) of RAM; more memory generally improves responsiveness.

Display: Super VGA (1024 x 768) or higher-resolution monitor with 256 colors.

Keyboard and Mouse required.

Recommended system requirements (to allow full use Nexsure including Office integration)

Windows 2000 professional or Windows XP professional only.

As above with Office (2000 or XP) added.

Per Microsoft recommendations:

128 MB of RAM plus an additional 8 MB of RAM for each Office application (such as Microsoft Word) running simultaneously

Connectivity requirements
Minimum 33.6K modem connection to the Internet
Recommended - Broadband (Cable, DSL, etc) or dedicated Internet connection

Instant Messaging
Instant Messaging requires network traffic to flow thru ports 2000 and 2001

Office Integration
Requires Microsoft Office 2000 or Microsoft Office XP

MICR Check Printing
Designed using PrintTerm MICR 2300 (modified HP 2300). All printers will have to be verified for production use.

What's New in Version 1.0.025

The previous version of Nexsure was 1.0.023. This is a list of new features that are available in 1.0.025.

Category	Added Features
Carrier Downloads	

- Badger Mutual
  - Home
- Citizens
  - Personal Auto
  - Home
- Financial Indemnity
  - Personal Auto
- Fireman's Fund
  - Personal Auto
  - Home
  - Dwelling Fire
- Frankenmuth
  - Personal Auto
  - Home
- Pekin
  - Personal Auto
  - Home
  - Dwelling Fire
- United Fire & Casualty
  - Personal Auto
  - Home
  - Dwelling Fire
- Western Reserve
  - Personal Auto
  - Home
- LOB's Added
  - Dwelling Fire
  - Safeco
  - Auto-Owners

Clients
- Client/Attachments – Pop Up added for required fields
- Client/Card File – Able to add @ into the stick-e-note

Organization
- Legacy Branch Code added to Branches screen

Policy	▪ Servicing/Claims – LOB's arranged in alphabetical order
	▪ Versioning enhancement to accommodate new and old versions of forms for binder and endorsement form population

Reports   ?   Below is the list of reports that are new or have been enhanced. Enhancements include added criteria and new report layouts:

- o Account Current
- o Accounts Receivable Detail
- o Actions Report
- o Aged Accounts Receivable
- o Balance Sheet
- o Book of Business
- o Carrier Payable
- o Cash Disbursements
- o Cash Receipts
- o Client Listing
- o Direct Bill Commission Receivables
- o Expirations
- o G/L Detail
- o Income Statement
- o Invoice Transaction Register
- o Journal Entries
- o Marketing Policies
- o Marketing Results
- o New Business
- o People Payables
- o Production
- o Production Analysis
- o Tax Authority Payables
- o Trial Balance
- o Vendor 1099 Disbursement
- o Vendor Payables

Security   ▪ Security has been added to the reports by category through the new user interface. A pop up to select Organization Information adds a second level of security, based on the user's org level. Organizational information is now required to run every report.

.NET   ▪ Common session transfer

Accounting

- .NET
  - Reworked summary to improve response time
- Account Balances
  - Reworked updates to improve response time
  - Added functionality to perform nightly update of account balances without user intervention
- Accounting
  - Improve performance to paging component

- Bank Accounts
  - Expanded length of Bank Account Number throughout Nexsure
- Chart of Accounts
  - Added ability to edit account fields prior to setup complete and create duplicate account names
- Disbursement
  - Order of OK & Cancel buttons switched for Confirm Print Disbursement Pop-up
  - Description decreased to 50 characters to fit on check memo line
  - Added items per page default dropdown
  - Improved performance of client disbursement navigation
  - Added name to Summary Report
- Fees
  - Changed application architecture to improve data integrity
- General Ledger
  - Added Mandatory Beginning Client Balance Account
  - Improved Search Entity Dropdowns
  - Updated search capability for GL Numbers at Org Level
- Invoice
  - Order of OK & Cancel buttons switched for Confirm Print Invoice Pop-up
  - Updated Invoice Reports
- Organization
  - Improved Filters
- Receive Payments
  - Reworked page to update navigation
  - Improved post process
  - Added items per page default dropdown
  - Added name to Summary Report
  - Proof of Payment Report added
- Reconciliation
  - Database design change to improve data integrity
  - Reworked page to update save

- o Added page for direct bill items independent of paging for agency bill items
- o Reworked non-people transaction search
- o Reworked people transaction search
- o Added items per page default dropdown
- o Recon Navigation for people and non-people, dynamic resizing and paging
- o Added Carrier Name to Remittance Advice
- o Added name to Summary Report
- o Added name to Remittance Report

- Reports
  - o Report Manger Folder added with new web forms and user controls
  - o Updated Report Manager
  - o Updated Pop Multi Search
  - o New web form added
  - o Increase Branch ID field size
  - o NexsureX/Report Manager Update
  - o Report Manager/Images Folder added
  - o Tabs added to Report Manager
  - o Added Security to Report Manager tabs
  - o Tab underline lengths adjusted
  - o Added Hello User to Reports Manager
  - o Views added to aid the generic Popup Search web form
  - o Table updates to OrgX and Production databases

Known Issues

Bug List

BUG ID	STATUS	DESCRIPTION
2792	Assigned	Reconciliation- A NexsureX application error is displayed when attempting to search for Direct Bill or Both from the Reconciliation Transaction search screen.
2751	Assigned	People Commission Defaults – The default people commissions are not pulling over to the invoice
2698	Assigned	Cannot populate Line of Business field in Reports > (Production Section) Production [Summary or Detail].
2783	Assigned	Transaction Invoices - The Internal Notes and Unique Message fields do not print correctly on the report and cause database errors.
2679	Assigned	Client Delivery - When you search by created by date or delivery date is returns no results but there are deliveries on those days
2923	Assigned	Security Template - The Opportunities [Marketing] link is disabled if the delete access of a policy transaction is not enabled.
2929	Assigned	Unable to post an invoice
2931	Assigned	Client Invoice - The business name is carrying over and printing over the address on invoices due to the length of their name.
2935	Assigned	Attachments Menu is not showing on client menu when deposits rights aren't given.
2953	Assigned	Invoice Printing - Cannot print a Deluxe Invoice with a tiered premium. Receive Crystal error
2960	Assigned	Deposits - When you deposit (EFT& ACH) into the Operating Account from the Trust Account, the transaction is not displayed in the Trust account transaction details
2961	Assigned	Bank Accounting Transactions - Reversed entries do not have their ID's tied together in this list.
2971	Assigned	People Recon- (DB1-1) Reconciling a partial payment to a Carrier will only display that partial amount available to reconcile against the People Commission.
2785	Assigned	Receive payments – Receive error when de-selecting all invoice and clicking on "save"

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Resolved Issues

Note: The items listed below were known issues in the previous version of Nexsure (1.0.023). Each of these issues has been resolved in Nexsure version 1.0.025

BUG ID	STATUS	BUG:DESCRIPTION	REPORTED DATE	FIXED DATE
1981	Fixed	Client/Locations – error received when special characters were entered	09/22/03	09/26/03
2498	Fixed	Security is setup so that the delete user could not import or export but the user is able to export when in a marketing policy	09/25/03	09/26/03
2747	Fixed	Reports/Customer Contact List - the report is not pulling all of the clients	09/24/03	09/30/03
2748	Fixed	Reports Customer Contact List - on some of the clients it is listing each phone number twice	09/24/03	09/30/03
2770	Fixed	Reports /Vendor 1099 Disbursement Report - the calendar does not display it shows error on page	09/24/03	09/30/03
2719	Fixed	Home Screen Search Filters displaying incorrect amount of pages.	09/22/03	10/02/03
2790	Fixed	Attachments - when you add ~`@!#$%^&*()_+}|{":?><,./;'[]\V*-+ in all the available fields they print in the "remove" icon field	10/01/03	10/03/03
2590	Fixed	Office Integration - Search Fields not pulling the correct information	09/08/03	10/03/03
N/A	Fixed	Certificates – pulling some policies from history for population	10/06/03	10/06/03
2800	Fixed	Identity - Cannot delete photo's or signature's form Identity	10/03/03	10/06/03
2786	Fixed	Client - when adding a client with client name "~`@!#$%^&*()_+}|{":?><,./;'[]\V*-+ " receive error.	10/06/03	10/06/03

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2713	Fixed	Org/Employee - When you enter special characters into the License Field when entering a new employee the employee is not added	10/06/03	10/06/03
2798	Fixed	Identity - Uploaded an employee photo, but it does not display until you refresh the screen	10/06/03	10/06/03
2676	Fixed	Client/Policy/Office Integration - All attachments displaying for this policy when I have not added any attachments to this specific LOB	10/07/03	10/07/03
2793	Fixed	Use the search filter in the set up actions if you search with ~`@!#$%^&*()_+}|{":?><,./;'[]\ the error is received	10/07/03	10/07/03
2831	Fixed	VBScript error received when editing a Region location	10/07/03	10/07/03
2710	Fixed	Home/Expirations - Page can not be displayed error when clicking on the Carrier Link	10/10/03	10/10/03
2711	Fixed	Org/Reg/Terr/Adding a Branch - Strange Message when trying to add a branch with special characters	10/10/03	10/10/03
2538	Fixed	Compound Billing - When you do compound billing details do not match the summary screen.	10/10/03	10/13/03
2704	Fixed	Client/Invoicing/Print - When you print an invoice the Bill to Address and the Client Information does not appear on any of the print types.	10/10/03	10/13/03
2576	Fixed	Terr/Acctg/Trans/Disb - Error if Description exceeds 50 characters	10/10/03	10/13/03
2690	Fixed	Deposit Slips - The detail check amounts are not on the report. Only the detail Cash amount is shown	10/10/03	10/13/03
2782	Fixed	Invoice Reports - The Unique Customer message is not printing on the Contemporary or the Professional invoice reports	10/10/03	10/13/03
2876	Fixed	Employee Log Off - This functionality only works if there are more than 2 people logged in	10/09/03	10/13/03

2094	Fixed	Acord 75S - Attempted to print form and the form is showing 51 pages	07/17/03	10/14/03
2694	Fixed	Delivery - When sending a fax/email it will display on the delivery summary screen the same amount of times the user has security on the user login info screen	09/18/03	10/14/03
2796	Fixed	Servicing - Claims - Select Claim from the servicing menu, click the drop down for LOB selection, the radial button jumps down to Audit	10/02/03	10/14/03
2788	Fixed	Opportunities - when ~`@!#$%^&* is adds in to commissions you receive an error	10/01/03	10/14/03
2824	Fixed	Data Flow/Endorsement - Expiration Date is not populating the change request properly	10/06/03	10/14/03
2550	Fixed	Rewrite cancelled policy - When you are rewriting a cancelled policy the confirmation pop up box is missing a word	09/03/03	10/14/03
2593	Fixed	delivery - the attach policy screen needs to be resized	09/08/03	10/14/03
2580	Fixed	opportunities - I am able to market an opportunity as a "delete only user"	09/05/03	10/14/03
2794	Fixed	marketing - when you remarked a package policy the original one only has one assignment but the re marketed policy has an assignment for each line of business	10/01/03	10/14/03
2787	Fixed	Delivery - I made an email address to send to ~`@!#$%^&*()_+}|{":?><,./;'[]\V*-+ and the status comes back as Successful.	10/01/03	10/14/03
2925	Fixed	Marketing Applications and Marketing History should be allowed to be deleted. When attempting to delete a VBScript error is displayed.	10/14/03	10/14/03
2913	Fixed	Disbursement to Client - Can not reverse a client disbursement in Production and can not post a client disbursement in Dev.	10/13/03	10/14/03

2752	Fixed	People Commission Defaults - The default people commissions are not pulling over into the invoice	10/14/03	10/14/03
2925	Fixed	Marketing Applications and Marketing History should be allowed to be deleted. When attempting to delete a VBScript error is displayed.	10/14/03	10/16/03
2788	Fixed	Opportunities – when ~`@!#$%^&* is added into commissions you receive an error	10/01/03	10/16/03
2938	Fixed	Attachments on Deliveries - Clicking the attachment button, but not having the checkbox checked is still attaching the item.	10/15/03	10/16/03
2943	Fixed	Client/Delivery/Viewer - Error when trying to view any part of a sent email	10/15/03	10/16/03
2824	Fixed	Data Flow/Endorsement - Expiration Date is not populating the change request properly	10/06/03	10/16/03
2955	Fixed	Search/Clients - A double dash is displayed in a 10 digit zip code on the main search screen	10/16/03	10/16/03
2946	Fixed	Primary search - when searching for a client type "prospect" none are in the system and the message says "No records found on specified search criteria for Client."	10/15/03	10/16/03
2950	Fixed	Org - when adding a region, territory, branch - you are able to set them up with ~`@!#$%^&* but you are not able to edit them	10/15/03	10/16/03
2710	Fixed	Home/Expirations - Page can not be displayed error when clicking on the Mercury Carrier Link	10/16/03	10/16/03
2801	Fixed	Card file - the policy link on the card file is not active if you are not assigned to the policy, it needs to be active to everyone who is assigned to the client	10/03/03	10/16/03
2956	Fixed	Disbursements - The Internal Note is supposed to accept (250) characters. If more than 50 are entered it errors out.	10/16/03	10/17/03
2952	Fixed	Receive Payment - Cannot print a receive payment summary	10/15/03	10/17/03

2973	Fixed	Workers comp - when 2 locations are added and a binder is created the location entered as 2 populates	10/17/03	10/17/03
2940	Fixed	Client/Delivery - Error when sending a message in delivery	10/15/03	10/17/03
2942	Fixed	FSC Import. Unable to import FSC files.	10/15/03	10/17/03
2694	Fixed	Delivery - When sending a fax/email it will display on the delivery summary screen the same amount of times the user has security on the user login info screen	09/18/03	10/14/03
2851	Fixed	Accounts Receivable - Paid taxes are not showing as paid on the report. Invoice is paid in full but the balance for the taxes still shows.	10/07/03	10/17/03
2825	Fixed	Policy/Coverage Terms - When you change the coverage term beginning date and time and you save the changes when you go into the policy the expiration time changes to match the beginning time	10/06/03	10/15/03
2801	Fixed	Card file – the policy link on the card file is not active if you are not assigned to the policy, even though the policy is restricted.	10/03/03	10/16/03
2796	Fixed	Servicing – Claims – Select Claim from the servicing menu, click the drop down for LOB selection, the radio button jumps down to Audit	10/02/03	10/14/03
2755	Fixed	Reports/Opportunity Summary – The count is incorrect in summary section.	0/24/03	09/29/03
2797	Fixed	Card File - I added a branch called ~`@!#$%^&*()_+}|{":?><,./;'[]\/*-+ and now the drop down on the search shows empty	10/07/03	10/07/03

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