



Nexsure 1.0.026 Release Notes
Thursday, October 30, 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.

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Purpose of Release Notes

This document is a summary of information about Nexsure 1.0.026, 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 1.0.026

The previous version of Nexsure was 1.0.025. This is a list of new features that are available in 1.0.026.

Category	Added Features
Carrier Downloads	<ul style="list-style-type: none">▪ LOBs Added<ul style="list-style-type: none">○ Personal Umbrella
Clients	<ul style="list-style-type: none">▪ Client/Card File – Ability to add # & * to sticky notes
Security	<ul style="list-style-type: none">▪ Ability of user who makes Org inactive to log back in and re-activate Org

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.
2797	Assigned	Card file - I added a branch called ~`@!#\$%^&*()_+} {":?><.,/;'[]\/*-+ and now the drop down on the search shows empty
2826	Assigned	Delivery - Error when trying to view a word doc temp attachment
2904	Assigned	Certificates - Client receives error when adding cert holder with "&"
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.
2966	Assigned	Reports - Profitability Summary - nothing pulls up
2968	Assigned	Reports - Financial Entities Summary Report - nothing pulls up
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.
3016	Assigned	ACORD 144 - The Glass and Sign Supplement does not appear in the tree after you agree to migrate to the new version
3025	Assigned	Invoice Posting - The LOB is not displayed on a People Commission done on an Agency Fee.
3055	Assigned	Reversing a Disbursement results in a database error message.

- 3123 Assigned Nexsure is pulling the 2nd location not the primary location into the acord form
- 3124 Assigned User goes to add an attachment without template or edit one at client level and the progress bar pops up then it goes away and nothing happens

Resolved Issues

Note: The items listed below were known issues in the previous version of Nexsure (1.0.025). Each of these issues has been resolved in Nexsure version 1.0.026.

BUG ID	STATUS	BUG:DESCRIPTION	REPORTED DATE	FIXED DATE
2094	Fixed	Acord 75S - Attempted to print form and the form is showing 51 pages	07/17/03	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
2580	Fixed	Opportunities - I am able to market an opportunity as a "delete only user"	09/05/03	10/14/03
2593	Fixed	Delivery - the attach policy screen needs to be resized	09/08/03	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
2690	Fixed	Deposit Slips - The detail check amounts are not on the report. Only the detail Cash amount is shown.	09/18/03	10/27/03
2698	Fixed	Cannot populate Line of Business field in Reports > (Production Section) Production [Summary or Detail]	10/18/03	10/28/03

2740	Fixed	Reports, actions report - when claim, acknowledgement rcvd from carrier, is selected it prints over open	09/23/03	10/14/03
2742	Fixed	Reports - Organization Employee Listing when you change the sort by to "employee title" you receive an error	09/23/03	10/14/03
2751	Fixed	Servicing - Submitted endorsements are not staying with a cancelled policy in History.	09/24/03	10/29/03
2752	Fixed	People Commission Defaults - The default people commissions are not pulling over into the invoice	09/24/03	10/14/03
2783	Fixed	Transaction Invoices - The Internal Notes and Unique Message fields do not print correctly on the report and cause database errors.	09/30/03	10/28/03
2785	Fixed	Receive payments - Receive error when de-selecting all invoice and clicking on "save"	10/01/03	10/29/03
2787	Fixed	Delivery – I made an email address to send to ~`@!#\$%^&*()_+} {":?><,./;'[]\/*-+ and the status comes back as Successful.	10/01/03	10/14/03
2788	Fixed	Opportunities - when ~`@!#\$%^&* is adds in to commissions you receive an error	10/01/03	10/14/03
2794	Fixed	marketing - when you remarket 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

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
2824	Fixed	Data Flow/Endorsement - Expiration Date is not populating the change request properly	10/06/03	10/14/03
2851	Fixed	Accounts Receivable - Paid taxes are not showing as paid on the report see client brad booth invoice #'s 3999 and 3842 are paid in full but the balance for the taxes still shows	10/7/03	10/21/03
2852	Fixed	Reports Home Page - Change back to generic page	10/07/03	10/14/03
2866	Fixed	Lost Business - Premium and Agency Commission should be a subtotal of invoiced premium and commission by policy.	10/08/03	10/24/03
2901	Fixed	"Ghost" amounts are showing up in the Disbursement Header screen. The beginning balance for business & auto ins's new org has been pre-populated with a beginning balance of 800,000 dollars.	10/10/03	10/16/03
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	10/21/03
2921	Fixed	Criteria Pages - Align text to justify right so colon is close to text fields	10/13/03	10/24/03
2923	Fixed	Security Template - The Opportunities [Marketing] link is disabled if the delete access of a policy transaction is not enabled.	10/13/03	10/29/03

2924	Fixed	Zip code displays additional "-" on the card file page on top of any that are entered into the entry screen.	10/14/03	10/27/03
2925	Fixed	Marketing Applications and Marketing History should be allowed to be deleted. When attempting to delete them a VBScript error is displayed.	10/14/03	10/14/03
2928	Fixed	Pop Up - select region reports and QA Terr still shows, should only show A terr and reports terr in terr drop down	10/14/03	10/24/03
2931	Fixed	Client Invoice - The business name is carrying over and printing over the address on invoices due to the length of their name.	10/14/03	10/29/03
2935	Fixed	Security - Attachments are not showing on client menu.	10/14/03	10/29/03
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
2940	Fixed	Client/Delivery - Error when sending a message in delivery	10/15/03	10/17/03
2943	Fixed	Client/Delivery/Viewer - Error when trying to view any part of a sent email	10/15/03	10/16/03
2952	Fixed	Receive Payment - Cannot print a receive payment summary	10/15/03	10/24/03
2953	Fixed	Invoice Printing - Cannot print a Deluxe Invoice with a tiered premium. Receive Crystal error	10/15/03	10/29/03

2967	Fixed	Reports - Cash Disbursements - the Internal Note line of data is not printing correctly.	10/16/03	10/24/03
2973	Fixed	workers comp - when 2 locations are added and a binder is created the location entered is # 2	10/17/03	10/27/03
3009	Fixed	Entities Tab - Change ASP to say reports under development	10/20/03	10/22/03
3010	Fixed	Profitability Each Assignment Unit - Move to profitability tab in accounting	10/20/03	10/21/03
3011	Fixed	Card file, contacts, additional logins - when you add a additional log in you receive a page can not be displayed error	10/20/03	10/29/03
3015	Fixed	Underwriting Narrative - Every field on the Underwriting Narrative is appearing twice	10/21/03	10/29/03
3019	Fixed	Error occurs when using delivery and trying attach a policy or certificate	10/21/03	10/21/03
3020	Fixed	Accounts Receivable - Report does not match recon	10/21/03	10/21/03
3021	Fixed	Cash Disbursements - Error running report	10/21/03	10/22/03
3031	Fixed	Adding a Region to the Org results in an error message.	10/22/03	10/27/03
3036	Fixed	Conversion v.80 to v1.0 - Set up Actions duplicated in the upgrade process	10/22/03	10/23/03
3037	Fixed	Carrier - Hartford is appearing twice in the transaction selection pop up even though it is only entered once at the Org level.	10/22/03	10/29/03

3040	Fixed	Security - Conversion process gave all users admin template. The template can not be reassigned or assigned on a new user.	10/22/03	10/27/03
3041	Fixed	Vendors - When adding a vendor and selecting the primary contact to a territory, there are empty spaces in the drop down box	10/21/03	10/29/03
3042	Fixed	Reports menu - Change wording from "Home" menu to "Report" menu on the Reports menu screen...	10/23/03	10/23/03
3044	Fixed	Expiration Report - Move the exclude actions check box and action type look up button to the left	10/23/03	10/23/03
3046	Fixed	Marketing history - when you send a marketing app to history you are able to add a line of business, a supplement, a premium.	10/23/03	10/28/03
3048	Fixed	Acord 35 - Cancellation Form Wizard displays double lines.	10/23/03	10/29/03
3049	Fixed	Actions - User receives vb script error clicking on actions40	10/24/03	10/29/03
3051	Fixed	Servicing Policy - Editing the policy results in an error message.	10/24/03	10/27/03
3052	Fixed	Security - Not all security templates are displayed on setup.	10/24/03	10/24/03
3057	Fixed	Servicing, adding a new line of business - when you use the application helper and you select to "Pre-fill from other application: Producer, Applicant and other policy detail prefilled."	10/24/03	10/29/03
3059	Fixed	Employee Listing - Remove sort 1	10/27/03	10/27/03

3086	Fixed	Aviation Form - Wizard has duplicate entry lines. (Two of each entry field)	10/27/03	10/29/03
3089	Fixed	Employee Listing - Add phone number in output next to email address	10/27/03	10/28/03
3091	Fixed	When user tries to save a stick-e-note she receive the 'Only certain characters are allowed' message, however she is only using letters of the alphabet	10/27/03	10/28/03
3093	Fixed	Production Report - Change title Entry to Created in Date drop down, only cosmetic change	10/28/03	10/28/03
3096	Fixed	Processing Endorsement the user was prompted to migrate the application. User accepted and the policy header was black and the endorsement did not work correctly.	10/28/03	10/30/03
3100	Fixed	Vbs script error when opening up a branch	10/29/03	10/29/03
3132	Fixed	Aviation Endorsement - The endorsement form is not coming up for the Aviation Custom Form.	10/29/03	10/29/03

Contact Information

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