



Nexsure 1.1 Release Notes
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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 1.1, 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 and Interface)

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

Interface

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 1.1

The previous version of Nexsure was 1.0.027. This is a list of new features that are available in 1.1.

Category	Added Features
CRM	<ul style="list-style-type: none">▪ Add Contact search to all "add new" screens▪ Add popup notification on search screen as to why client can not be deleted (has active marketing or policy info, etc.)▪ Clear history from Search screen when client has been deleted▪ Client Profile - Owned/rented premises - default to blank if no data▪ Add "Search & Sort" to Organization Menu "all locations" tab▪ Organization - Add Search & Sort to Region screen▪ Organization - Add Search & Sort to Territory screen▪ Organization - Add Search & Sort to Branch screen▪ Additional Action Type and Action Topics
Security	<ul style="list-style-type: none">▪ Create specific log in & log out times by user▪ Add expiration date & time to login accounts▪ Increase Security functionality▪ Lock down Login Screen contact link▪ Lock down mandatory GL use by user▪ Enhance security on use of mandatory general ledger numbers
Interface/Integration	<ul style="list-style-type: none">▪ Allow items to be removed from Interface menu▪ Add "Policy Exception – All" as a search option to Interface▪ Add sort options to Interface Menu▪ On home interface screen "show/hide", combine the "show/hide" to toggle appropriately▪ Populate rest of header in remarks overflow▪ Show Carrier as product name and Vendor as file sent from on Interface Menu▪ Show accident/violation points in remarks▪ Take LOB from actual code, not routing code▪ Add rest of personal LOB's: Package, Inland Marine, Dwelling Fire, Watercraft and Umbrella▪ Add Carriers▪ AL3 Interface UI▪ eServices: Better error handling and added a default demo page if one is not available

Policy

- Claims - Pre-fill to claims Forms
- On opportunities, activate the inactive feature to work properly
- On all navigation page numbers at top and drop down page numbers combine drop down box with existing page number 1 of 10. When you click the number select the page number to navigate to.
- Printing of Fleet auto I.D. cards
- Revised Binder flow
- Certificates - ability to add multiple holders
- On home actions screen "show/hide", combine the "show/hide" to toggle appropriately
- On home opportunities screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home marketing screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home binder log screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home edits screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home audits screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home expirations screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home endorsements screen "show/hide", combine the "show/hide" to toggle appropriately.
- On home cancellations screen "show/hide", combine the "show/hide" to toggle appropriately
- On home claims screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client Opportunities screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client marketing screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client policies screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client claims screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client actions screen "show/hide", combine the "show/hide" to toggle appropriately.
- On client delivery screen "show/hide", combine the "show/hide" to toggle appropriately.
- Search/sort on policy screen, client home menu
- Prefill Acord forms with agency mailing address (not location address)

- Office Integration
 - Integrate Outlook with attachments. (Allow email to be attached and their attachments and view capabilities. Maybe should look like delivery viewer)
 - On client attachments screen "show/hide", combine the "show/hide" to toggle appropriately.

- Accounting
 - Add search/sort to department screen
 - On client transactions screen "show/hide", combine the "show/hide" to toggle appropriately.
 - Batch check processing
 - Print each compound billing separately
 - Account Maintenance - After setup is marked complete, allow changing some field values for non-mandatory accounts
 - Bank Accounts - Include [Update GL Balances] on list view
 - Consistency - Show or Hide display on all search screens
 - Departments - Add search functionality to department list
 - Disbursements - Return Payments create list view selection like reconciliation
 - Disbursements - Display client balance in check header to insure not refunding money when a client owes agency money
 - Disbursement - need ability to select from all carrier locations and subord. Names
 - Monthly processing - Lock months automatically at month end
 - Return Payments - Create list view selection like reconciliation
 - Rec Payments - Implement NSF functionality - tracking #/invoice type NSF
 - Recon - Add Client Name to invoice search results
 - Recon - Rework Recon/Carrier transaction Path
 - Recon - All people, carriers, tax authorities are displayed in Search field prior to starting the search
 - Transaction Accounting Search screen clear/search buttons are not uniform throughout the different entry screens
 - Transaction Summary - Update Account Balances
 - Add Installment option to split taxes, fees and rounding options between down payment and installments

- Reports
 - New Reports Interface
 - Reports enhancements (off load report requests to dedicated reporting server)
 - Account Groups Add print / export functionality
 - Account Types Add print / export functionality
 - Accounts Payable - Add print / export functionality
 - Chart of Accounts Add print / export functionality

Reports (con't)

- Deposit Add print / export functionality
- Disbursements Add print / export functionality
- Journal Entry Add print / export functionality
- Receive payment Add print / export functionality
- Recon - Add print / export functionality
- Invoicing Setup - Fees and Taxes add print/export functionality
- Book of Business
- Cash Disbursements
- Production Comparison reports
- Tax Authority Payables
- Vendor Payables
- Budget Report
- Customer Statement report

Known Issues

Bug List

BUG ID	STATUS	DESCRIPTION
1048	Assigned	clients, servicing, edit-when you turn the compare on, and go from a many to a single you receive a wizard error
2163	Assigned	Accounting Security - Created a template with View only right to Accounting, made the user at the Branch level only. Able to do all GL accounting functions
2679	Assigned	Client Delivery – When you search by created by date nor delivery date is returns no results but there are deliveries on those days
2715	Assigned	Reports/Client Contact List - Error when searching for name with special characters in the field
2826	Assigned	Delivery - Error when trying to view a word doc temp attachment
2853	Assigned	ACORD 90 PR - Need to add Puerto Rico to the "state" drop down menu
3037	Assigned	Carrier - Hartford is appearing twice in the transaction selection pop up even though it is only entered once at the Org level.
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
3175	Assigned	Invoice / Bill to - Location and Contacts for ALL finance companies appear in the drop down selections after you select one specific company.
3180	Assigned	Invoice / Bill to - When using a Finance Co as a "Bill To" the client name does not appear on the invoice 80626
3220	Assigned	Deposits - The Estimated Balance on the Deposit Header is adding the deposit amount twice.
3225	Assigned	ACORD 82. Data Flow, Binder and Endorsement not working.

- 3234 Assigned Pending Endorsement failed to show up under Client - Policies.
- 3266 Assigned Org - When you add a Region, Territory or Branch to the Org the Entity Name disappears when you do a search for contact.
- 3273 Assigned ACORD 24, 25 & 27. All the certificate forms are broken. Unable to produce forms.
- 3317 Assigned Additional Logins - Change "Chubbs Insurance" to "Chubb Insurance" in the drop down selection box
- 3401 Assigned Pay All Selected is not assigning credit to item(s) selected
- 3404 Assigned In reconciliations, filter by line of business does not filter in the search area of transactions.
- 3411 Assigned Disbursements - Check Number field accepts more than 10 numbers, but if more than 10 is entered either it won't save or it results in a SQL error
- 3414 Assigned Payments Received reversal after the date booked period has been locked is reversing and automatically changing the Date Booked to 1/1/1900.
- 3415 Assigned Accounts Payable - When paying an accounts payable item partially, the "Processed" box returns with a check in it.
- 3416 Assigned Disbursement - Subordinate carrier names and addresses should display for selection (like reconciliation).
- 3417 Assigned Invoice - When "Bill To" says related account, box pops up to three pull down screens...Name, Location, Contact. If there is no address to choose from in the location pull down, moving ahead in the selection is impossible.
- 3423 Assigned Invoice - When setting up a new invoice where the Branch it is connected to has an apostrophe (') in it, and when adding new Policy Fees in the invoice Non-Premiums Screen, a "bad" screen is produced in error.
- 3458 Assigned Home - Setup - Opportunity - Contacts. Unable to add a new contact although there are only three contacts.
- 3459 Assigned Trans Summary - At Org level, Trans Summary totals do not display (not rolling up from territory). Balances sow, but wrong

amount.

- 3474 Assigned Actions - User has an empty record action that can not be closed, changed, or deleted.
- 3480 Assigned Vendors - Cannot page to 3rd page in the Territory > Vendors screen.
- 3501 Assigned Invoicing - Getting error message when invoicing clients with long names
- 3525 Assigned Accounts Payable - The "Abort" displays the confirmation dialog, but after clicking "Ok" the entry is still not deleted.
- 3543 Assigned Import - Cannot import form schedule data
- 3545 Assigned Accounts Payable - Reversing an AP and clicking "Abort" on the reverse record does not actually delete the reverse record or refresh the summary screen, and displays an error message on the form.
- 3590 Assigned Invoice - DB2-2a People Payables are posting to "People Payable Due" when invoice is posted.
- 3591 Assigned policies, certificates - when you select the certificates tab you receive an error
- 3595 Assigned Balance sheet is not displaying groups and types properly.
- 3596 Assigned Transaction Accounting - Period 2 is locked and Period 1 is unlocked. The system still allows us to post in period 2
- 3597 Assigned Data conversion policies cannot be reinstated. Some were converted as expired but did not have renewals and we need to be able to reinstate. Also, policies may have been canceled but we now need to reinstate
- 3607 Assigned Disbursement - Deluxe Check 80971 printouts are not displaying written amount with "/100 cents" and no check information in middle section of check form.
- 3612 Assigned Employees search on disbursements returns no results even though clients are assigned to that entity.
- 3624 Assigned Opportunities - when adding a contact I click save and the "add a contact pop up" stays and the drop downs become blank

- 3652 Assigned Servicing - Client is processing a renewal, renewed policy status is "Empty" and cannot be edited.
- 3660 Assigned Policy PDR - Inserting a "#" in a policies number field will result in a Page Can Not Be Displayed error when creating a Production Data Record for that Policy.
- 3662 Assigned servicing claims - you are able to select the additional interest yet there is no place on it on the claim form if you are able to select it should the 45 be attached
- 3664 Assigned Advance Payment - Reversed Advanced Payment records appear in the Receive Payment Invoice List to be selected for applied payment.
- 3674 Assigned When trying to add a PDR or post an invoice bob is unable to select a department. Nothing is showing in the drop down box.
- 3694 Assigned GL Numbers - Numbers not propagating correctly
- 3709 Assigned Reconciliation - Received an error while processing a Carrier Recon
- 3710 Assigned Document template - error received trying to create a template
- 3711 Assigned ACORD 84 - Endorsement is not populating
- 3714 Assigned Posting disbursements - Timeout out error posting a disbursement
- 3723 Assigned Units / Departments - When you select a different dept with units, the units for the first selection and the second selection show in the dropdown.
- 3731 Assigned Delivery - Photos were not sent through delivery.
- 3739 Assigned Problem Description: Agent receives following error when posting an invoice:” Internal error: Invoice items not in balance with installments.”
- 3740 Assigned Client is trying to reinstate policy to process an endorsement however the reinstate link is not active.

- 3742 Assigned Client is cutting a payroll check for an employee. Occasionally (more often then not) whenever the payroll check has cents in it he receives an error message saying that it is off by that same amount of cents and wants him to round up.
- 3743 Assigned Invoicing - Cannot invoice a premium from a policy in History
- 3748 Assigned Invoice Printing - Cannot print one invoice
- 3749 Assigned Actions - Receive Page cannot be displayed error on some actions
- 3754 Assigned ACORD 83 - Two forms are pulling up in the header screen for the 83
- 3781 Assigned Disbursements - Financial entity in the disbursement has no payee information linked to it.
- 3784 Assigned Client Profile - Attachments. LOB/Policy # Cert#/Ref# not showing at summery menu.
- 3787 Assigned Downloads - Client goes to click on red policy exception link and receives a VBScript error
- 3795 Assigned Agency assigned credits at customer level not at Organization - Accounting - Receive Payment level and now payment not showing up on reports as paid or as assigned at receive payment level.

Resolved Issues

Note: The items listed below were known issues in the previous version of Nexsure (1.0.027). Each of these issues has been resolved in Nexsure version 1.1

BUG ID	STATUS	BUG:DESCRIPTION	REPORTED DATE	FIXED DATE
3203	Fixed	Delivery, fax - when you send a fax it errors	11/05/03	01/22/04
3590	Fixed	Invoice - DB2-2a People Payables are posting to "People Payable Due" when invoice is posted.	12/08/03	01/22/04
3597	Fixed	Data conversion policies cannot be reinstated. Some were converted as expired but did not have renewals and we need to be able to reinstate. Also, policies may have been canceled but we now need to reinstate	12/08/03	01/22/04
3607	Fixed	Disbursement - Deluxe Check 80971 printouts are not displaying written amount with "/100 cents" and no check information in middle section of check form.	12/11/03	01/22/04
3709	Fixed	Reconciliation - Received an error while processing a Carrier Recon	12/29/03	01/22/04
3711	Fixed	ACORD 84 - Endorsement is not populating	12/29/03	01/19/04
3714	Fixed	Posting disbursements - Timeout out error posting a disbursement	12/29/03	01/12/04
3731	Fixed	Delivery - Photos were not sent through delivery.	12/29/03	01/12/04

3739	Fixed	Problem Description: Agent receives following error when posting an invoice: "Internal error: Invoice items not in balance with installments."	12/31/03	01/12/04
3740	Fixed	Client is trying to reinstate policy to process an endorsement however the reinstate link is not active.	12/31/04	01/12/04
3749	Fixed	Actions - Receive Page cannot be displayed error on some actions	01/05/04	01/12/04
3754	Fixed	ACORD 83 - Two forms are pulling up in the header screen for the 83	01/05/04	01/12/04
3787	Fixed	Downloads - Client goes to click on red policy exception link and receives a VBScript error	01/06/04	01/12/04
4054	Fixed	Downloads are not creating client in Nexsure	01/26/04	01/27/04
4059	Fixed	VBScript runtime error after clicking Client Contact Selected Admin user as contact - Opportunities Summary report	01/26/04	01/27/04
4080	Fixed	Certificate holders security problem	01/26/04	01/27/04
3634	Fixed	Clients with inforced policies from a download do not have "Client" status in Nexsure. Still marked as "Suspect" on main search screen	12/15/03	01/27/04

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