



## Nexsure 1.1.001 Release Notes Tuesday, February 03, 2004

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 1.1.001, 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 1.1.001

The previous version of Nexsure was 1.0.027. This is a list of new features that are available in 1.1.001.

<b>Category</b>	<b>Added Features</b>
Security	Multiple
Servicing	Certificate multi-holder functionality
Office Integration	Outlook integration
Accounting	Multiple
CRM	Multiple
Partner Integration	Real-time integration with CoverageCorp
	eServices: additional carriers added (Infinity, Leader, CoverageCorp, St Paul)

## Resolved Issues

Service pack 01-15-04

3840	Duplicate rows on the Home Interface screen
3784	LOB/Policy #/Cert #/Ref is not displayed on the Attachments screen
3547	People Payables; Data not lining up in columns, column header and data repeat
3548	Invoice Trans Reg; Sort drop down needs to be justified left
3602	Accounts Receivable; Have residual amounts on cash receipts show
3631	Book of Business; first column needs to be set to grow on summary. It overwrites the LOB column
3638	Production Detail; add subtotals to all dollar amounts
3642	Carrier listing; add phone number to report output
3703	Carrier Listing; Data is skewing, need to remove physical address and parse city state and zip into separate columns
3792	Accounts Receivable; add disbursements to clients onto the report
3796	Accounts Receivable; Remove second grouping
3799	Accounts Receivable; Add "As Of" date to report output
3833	Production Detail; Invoices replicating
3836	Invoice Transaction Register; Invoices replicating
3851	Accounts Receivable; A/R Balance not showing correctly
3852	Accounts Receivable; Future installments should not show beyond "As of" date
3853	Accounts Receivable; Transaction ID sorting numbers as text 100 is less than 92
3723	Units/Departments; when you select a different dept with units, the units for the first selection and second selection show in the drop down
3658, 3590	Invoice reporting People Payable Due when it should be reporting People Payable Nondue.
3885	Aged AR not working
3710	Document template; error received trying to create a template
3841	Fees have the old fee selection screen

Service pack 01-26-04

	Disable certain reports
	Claims dataflow JavaScript error
	Invoice printing
4052	Attach Outlook message

Service pack 01-27-04

4054	Downloads are not creating client in Nexsure
4059	VBScript runtime error after clicking Client Contact Selected Admin user as contact
	Opportunities Summary report
4050	Security exception when clicking Client Attachments
	The breakout of combo reports into individual reports
4080	Certificate holders security problem
	Pre 1.1 invoices not initialized
3634	Clients with inforced policies from a download do not have "Client" status in Nexsure. Still marked as "Suspect" on main search screen.
4079	Error populating an endorsement (ACORD 131 dataflow will be updated)
4067	Customer Statement report
	People Payables report

Service pack 01-28-04

4082	Creating new client results in access denied error
3940	Home actions: when you edit an existing action then click add the popup refreshes with a different client name
	HRH users unable to review actions
	Reports time out problems
4089	Adding Outlook message with attached Word document as attachment

Service pack 01-30-04

4078	Object reference not found on Carrier Recon in disbur/Receipts section
4076	Issue adding General Ledger Number
	People commission amounts are duplicating, for DB PP2 during reconciliation
4070	Invoicing: Post \$0 invoice; post fee on a \$0 premium
4104	Processing a cert for a client takes very long time
4093	Addresses are not printing on checks 80971
4071	User is unable to login to Nexsure. "Redirected to a non secure website" error.
	People Payables report (duplicates)
	Customer Statement report timeout

Service pack 02-02-04

	Cash Receipts report update
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	Client Listing report update
	Client Listing Export report update
	Commission Receivables report update
	Expirations report update
	AP Disbursement hotfix
	Org name cannot edit

## Contact Information

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