



Nexsure 1.1.003 Release Notes

Monday, March 01, 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 1.1.003, 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 1.1.003

The previous version of Nexsure was 1.1.002. This is a list of new features that are available in 1.1.003.

Category	Added Features
CRM	Display the primary phone number on the card file
CRM	Added primary designation to contact phone number
Security	When creating new login, "notify admin" checkbox is unchecked by default

Resolved Issues

Service pack 02-18-04

4223	Add new Client, search for Primary Contact functionality was removed
4244	Access log shows Admin and Nexuser
	Incorrect text on message box when deleting a phone number
4266	Journal entry report doesn't work
4287	Cannot print journal entries
	Client mailing labels report
	Accounts receivables report
	Ages accounts receivables report
	Spelling error on telephone popup
	Spacing error on the delete column on client contact screen
	Certificates: error when DOO text is entered as contiguous string over 100 characters in length.
3806	Adding new invoice w/Policy, no policies appear.
3795	Agency assigned credits assigned at client level are not at Org level.
4247	Disabling of multi posting of Recon and Receive Payments
4259	Security: the client has account manager rights and under policy they should be able to add an assignment and the link is grayed out.
3748	Cannot print invoice

Service pack 02-27-04

4234	Endorsements: When you have 2 submitted endorsements and you post the first one it sends the policy to history. (MB)
4289	The phone number does not display on the card file. (DEV)
4264	Client Listing: Hard code sort Ascending by client name (RT)
4310	Trial balance returns all entitiy levels (RT)
4311	GL Details returns all entity levels (RT)
4319	Accounting reports do not return the proper entity level (RT)
3833	Production Detail: Invoices replicating (RT)
4135	Production Report: Need to make it so client name can grow on summary and detail (RT)
4327	Aged AR: Need to fix sort by client (RT)
4331	Production: Formatting changes per Attached (RT)
4177	Receive Payment Defaults: Receive Nexsure X Error clicking on this tab in Invoicing Setup (PC/RF)
3660	PolicyPDR: Inserting a "#" in a policy number field will result in a page can not be displayed error (PC/RF)
4019	Carrier checks do not print mailing address (PC/RF)
4233	Disbursements: Payee name search is not working including Payee

	Name with Apostrophe (PC/RF)
4303	Compound Billing Invoice does not print (PC/RF)
4239	GL report: There is a problem with running a report for trial balance. It times out the first time you run it but comes back almost immediately when ran for the second time. (PC/RF)
4245	ACORD 140: when 20 or more premises info's are put in the browser freezes or times out. (RM)
4279	Cannot print application. (RM)
4218	Help: attachments it says that the discription is optional, if you do not add one you get a pop up that states to add one. (DEV)
4292	
4352	Interface: Mass accept is making the interface screen display strange until search is redone. (DEV)
4353	Interface: Search filter should be standardized to match rest of app (DEV)
4354	Interface: Error message when you have a duplicate policy needs to be changed (DEV)
4355	Interface: Dropdown test is being cut off in the exception dropdown (DEV)
4356	Interface: Search filters are not working properly (DEV)
4357	Interface: Initial Import should not display in the premium downloaded filed (DEV)
4358	Interface: The screen should not resize and add a scroll bar (right left) when there is a lot of data (DEV)
4359	Interface: When excepting the creation of a black policy when endorsing a policy that does not exist you get a error message (DEV)
4360	Interface: Delete confirmation is needed when removing items from the interface screen (DEV)
4361	Interface: When entering an invalid date on the interface search you get an error message (DEV)
4362	Interface: When there is an apostrophe in the client name and you do a search the system was automatically removing it (DEV)
4363	Interface: Error message needed when you enter an invalid date (DEV)
4323	Interface: User noticed that each time a policy change has been received for client it creates a new policy and does not send the old one to history. Client has 3 active policies with same policy number. (DEV)
4090	Interface: The downloads did not update the policy term, they are in History. (DEV)
4378	Interface: Blank Policies coming in through Interface (DEV)
4348	Interface: All Cancellation are failing and giving an error message (DEV)
4194	Receive Payment: NexsureX error clicking on the Rceive Payment tab (PC/RF)
4142	Set up: The color schemes the teal logo is listed as "tesl" (DEV)
4100	Servicing cancel: A pending cancel does not show up on the policy

	screen (DEV)
4046	Online Help: Nexsure database version and system component version still says 1.0 (DEV)
3960	Security: An add/view user is not allowed to add any attachments (DEV)
3874	Policy servicing: The 1.1 icons for the template functionality appearing in this 1.0 org. (DEV)
4346	Production: People commission not returning (RT)
4347	Production: Remove manual bills (RT)

Contact Information

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