Nexsure 1.1.005 Release Notes
Monday, March 29, 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.

Contents Include:

Purpose of Release Notes

This document is a summary of information about Nexsure 1.1.005, 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 1.1.005

The previous version of Nexsure was 1.1.004. This is a list of new features that are available in 1.1.005.

ENHANCEMENT ID	DESCRIPTION
191	Policy: Schedules: Need ability to ID unit you are working with (scheduled items)
486	Home: Opportunities: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
487	Home: Marketing: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
488	Home: Binder Log: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
489	Home: Edits: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
490	Home: Audits: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
491	Home: Expirations: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
492	Home: Endorsement: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
493	Home: Cancellation: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
494	Home: Claims: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
495	Interface save filter settings
504	Clients: Policy Summary: Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
717	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Commercial Auto)
718	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Homeowners)
719	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Personal Auto)
720	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Truckers)
721	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Garage and Dealers)
722	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Watercraft)
723	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Dwelling Fire)
724	Policy: Schedules: Need ability to ID unit you're working with.

	(Scheduled items Mobile Home)
725	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items Personal Package)
726	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items CGL)
727	Policy: Schedules: Need ability to ID unit you're working with. (Scheduled items EDP)

Resolved Issues

Service Pack 03-19-04

BUG ID	DESCRIPTION
3025	The LOB is not displayed on a People Commission done on an Agency Fee in the Invoice Posting screen. The field is blank.
3411	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
3454	Accounts Payable: In Org2, Org9, Org60, No defauld date appears in the Due Date section.
3525	Accounts Payable: The "Abort" displays the confirmation dialog, but after clicking "Ok" the entry is still not deleted.
3664	Advance Payment: Reversed Advanced Payment records appear in the Receive Payment Invoice List to be selected for applied payment.
4159	The CFO from JDW cannot balance the month of December.
4340	Changing the status of a G/L Account and doing a search for a GL Account will duplicate the "Status" list items. See screen print.
4456	Receive Payment: User must click on Receive Payment Invoices link twice to get it to navigate to next screen.
4465	Bob is able to post a deposit without selecting a receipt or inputting a GL entry
4477	Cannot select a bank account when doing a search in Deposits. One is hardcoded.
3434	FSC: The premium for UMBI not populating the ACORD 90 CA.
3437	FSC: The employment address and phone number not populating the ACORD 90 CA.
3439	FSC: The date of violation of the third accident not populating the ACORD 90 CA.
3445	FSC: Sprinkler selection not populating the ACORD 80
3941	75 files started downloading yesterday, only 8 have gone through and status of some is "Processing Data..."
4349	Interface: Endorsements are comming in as in forced and not received
4350	Interface: Error when you do a search by Interface Type
4488	Interface: Process date outside of policy term message has cancel spelt wrong.
4489	Interface: Space is needed between the period and the C in the policy term cancellation message
3232	ACORD 50 OK: when you select this form you receive an error.
3402	ACORD 50 OK: The ID failed to print open.
4171	Endorsement on an ACORD 146 copies all equipment to the change request form
4213	Claim: I have a blank commercial auto form and i put a claim on it, i populated it and it returned a data transmission error
4402	Getting an error when attempting to create an auto ID card for GA.

4450	Acord 127/137 Texas Commercial Auto form is missing in production.
4369	BOP form has premises info on both the main 160 form and base 125 form. The overflow form is pulling from both forms.
4474	Location City field is missing from the Nexsure Fields when creating a document for Personal Auto app.
4475	Certificate fax deliveries are not being displayed on the Certificate Delivery screen
4503	Certificate Holders/Interest Type: Able to enter unlimited number of characters, only 51 characters print.
4443	Check type 80971 is printing the data on the line of the check.

Service pack 03-26-04

BUG ID	**DESCRIPTION**
3416	Disbursement: Subordinate carrier names and addresses should display for selection (like reconciliation).
3743	Cannot Invoice a premium from a policy in History.
3916	Account groups: The Add New link does not show as active when you hover the mouse over it.
3925	Client opportunities: Added an opportunity, receive error when adding a contact
3931	Delivery : Address Book : enter first and last name : no result
4372	Compound Billing: Cannot post a CB invoice
4433	Residual Detail does not display on a posted Disbursement
4435	The Agency street address is not printing on the contemporary and professional invoice report.
4457	Cannot renew a package policy for client Roach, Howard, Smith, Hunter
4458	LOB and policy numbers not showing on attachments for client Richard Vargas. When you click on the details icon however it shows all the correct info
4499	Auto Id Card: User is creating Auto Id card for a policy, select the Generic 50 but the ACORD 50 FL shows up
4517	Interface: when you click the interface link it gives a Microsoft VBScript runtime error '800a01a8'
4523	Unable to print ACORD 125 app. for client Fischer III LLC.
4528	Servicing: Endorse: run time errors
4529	The pip is not populating on the change request form for 127 TX
4530	Policy is sent to history after doing endorsement. Status of policy in history is shown as bound. Options to reinstate/inforce are grayed out.
4538	Mercury: Cannot access EServices
4539	Accounitng Period for year 2004 is missing.
4540	Need to remove 3 Termintated employees from Org. They show up in all Searches.

Contact Information

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