Nexsure 1.1.1.007 Release Notes
Thursday, June 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.

Contents Include:

Purpose of Release Notes

This document is a summary of information about Nexsure 1.1.1.007, 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.

Software and Hardware 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 2000 or XP Professional with Internet Explorer 5.5 or higher. **

Refer to Microsoft hardware requirements, Personal Computer with 133 MHz or higher Pentium-compatible CPU for Windows 2000 or 233 MHz or higher Pentium-compatible CPU for Windows XP Professional; 64megabytes (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.

Adobe Acrobat Reader - version 5.0 or higher (free download from http://www.adobe.com/products/acrobat/readstep2.html)

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
Broadband connection (Cable, DSL, etc) or dedicated Internet connection

Instant Messaging

Instant Messaging requires network traffic to flow thru ports 2000 and 2001

Java Virtual Machine for Internet Explorer (free download from SUN Microsystems at http://www.java.com)

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.

** **If you are upgrading from Windows 98 a fresh install must be performed (not a version upgrade)**
****Verify existing Hardware meets Windows 2000/XP Pro requirements**

What's New in Version 1.1.1.007

The previous version of Nexsure was 1.1.006. This is a list of new features that are available in 1.1.1.007.

ENHANCEMENT NUMBER	**DESCRIPTION**
919, 920, 921, 922	New carrier imports (MetLife)
923, 924, 925	New carrier imports (Vesta)
926	New carrier imports (Frederick)
927, 928	New carrier imports (Frankenmuth Mutual)
929, 930, 931	New carrier imports (Foremost)
932, 933, 934	New carrier imports (EMC/Employers Mutual)
935	New carrier imports (Dairyland/Sentry)
936	New carrier imports (Commerce)
937	New carrier imports (Citizens
938, 939	New carrier imports (Allstate)
729, 730, 731	New Interface Download Phase 1
779	New Cancellation Handling
810	ACORD 144 form
830	ACORD 130 form
992	Interface Downloads Utica Personal Auto
993	Interface Downloads Utica Homeowners
994	Interface Downloads Utica Dwelling Fire
995	Interface Downloads Virginia Mutual Personal Auto
996	Interface Downloads Virginia Homeowners
998	Interface Downloads Added Carrier Seq. ID
1000	Interface Downloads Donegal Home
1001	Interface Downloads Encompass Auto
1002	Interface Downloads Encompass Home
1003	Interface Downloads Employers Mutual Umbrella
1004	Interface Downloads Southern Family Home
1005	Interface Downloads Hingham Home
1006	Interface Downloads Hingham DF
1007	Interface Downloads Allied DF
1081	Interface Downloads Vesta - Personal Auto
1082	Interface Downloads New Jersey Skyland Personal Auto
1083	Interface Downloads New Jersey Skyland Dwelling Fire
1084	Interface Downloads GMAC - Personal Auto

1085	Interface Downloads Erie – Homeowners

Resolved Issues

Service Pack 04-23-04

BUG ID	DESCRIPTION
3781	Disbursements - Financial entity in the disbursment has no payee information linked to it.
3949	log in screen - i created a log in "security53" and entered in the incorrect password to lock the account out. then i selected "forgot password" and the browser just runs it never takes me to the next screen
4209	opportunities, contact role - the contact roles were deleted and changed and now they will not show up in the drop down
4241	I ran the Balance Sheet Summary and found that the Total Liabilities/Equity Income value is not correct. This value should be the sum total of the Total (Liabilities/Equity) and Net Income.
4424	Cash Receipts - Need to include all types of payors. Only shows clients now.
4426	Cash receipts - Need to show reversals with both numbers
4446	Production - Add grouping by people last name
4462	claims - if the policy is in history the populate button is not active
4468	Opportunities Reports - Need to look at other than just primary assignment when searching by assignment name
4496	Outlook Attachments. LOB/Policy # Cert#/Ref# not showing at summery menu.
4498	Invoice Set Up - Receive Payments Defaults, Receive is spelled wrong.
4515	Problem Description: User is trying to audit a policy from a previous term but it is not showing in the available selections
4520	delivery viewer - i have a doc that was made using office intergration and i tried to view it from the delivery viewer and it gives a pop up asking what do i want to open it with
4537	Cannot attach Word Document using a template to a client
4546	Error endorsing policies for Sunset Electric
4557	Card file tab at the territory and branch levels is blank
4562	Invalid attachments URL on policy history screen
4575	Payment Advance- Cannot do a direct bill down payment swipe due to no payment advance invoice posted.
4577	black policy header - When user goes to inforce marketing policies it is returning the black header.
4665	Deposit - The Receipt page has the column header "Amount Received" spelled incorrectly.
4670	Error using office integration
4676	Client users permissions error
4719	Books are not assigned at Territory, only Org. Cannot edit this
4720	Closing a binder does not reset the policy coverage term
4722	Error on Home Binder Log screen

4727	Binder details disappear when closing binder
4736	Invoice Fees - Doing a G/L override on a fees G/L assignment results in a NexsureX error.
4737	User tried to reverse a payments advance, the screen refreshed but no reversal is shown and the Reverse button i now inactive
4740	Security templates disappeared
4741	Error on Home Binder Log screen
4748	Receive Payment on Payment Advance - The invoice screen of the receive payments screen errors out if a payment advance is done.
4750	Error on Receive Payment Default tab
4752	Inforcing policy sent it to history
4753	Income Statment Detail - Not Grouping Properly
4754	Balance Sheet Details - Not Grouping Properly
4755	Deposit slip report error
4759	Receive error invoicing Drury Brothers Roofing.
4760	servicing - User posted an edit to a personal auto policy. The policy was sent to history but no copy is on the policies tab
4765	User is unable to click between radio buttons on certificate holders tab
4766	Users are being kicked out of the system several times a day with inactive messages
4767	when she inforces marketing policies the system is returning a black header
4785	Carrier Payable Report - Running the report results in an error message.

Service Pack 05-07-04

BUG ID	DESCRIPTION
3930	Document template - The LOB selected is not displayed in the Nexsure fields.
4019	Carrier checks do not print the mailing address
4100	servicing cancel - When a cancellation is done, but is left in Pending status, the policy info is not showing up on the client card file, lower left hand corner.
4145	People Payables Report - The commission balance due for a flat amount people commission is not correct.
4206	Client - Related Accounts - Add new related account. Search by tax id not working
4209	Opportunities, contact role - he contact roles were deleted and changed and now they will not show up in the drop down
4301	When running the Expirations Report to view this year’s expirations only 1 client comes up. However, if the customer goes to the Home/Expirations and uses the search filter several more come up.
4313	Invoice Transaction Register - Change output to mimic Production Detail with choice for break-out
4314	Invoice Trans Reg - Invoices Replicating invoices
4329	Setup - User Rights Templates - Status, Date Last Modified does not update.
4395	Spelling error - Delivery, error message returned has the word "Occurred" spelled

	"Occured"
4405	People Payables - Partial Payment wrong
4411	People Payables - Carrier Recon not showing correctly
4424	Cash Receipts - Need to include all types of payors. Only shows clients now.
4426	Cash receipts - Need to show reversals with both numbers
4500	Tax Auth Add States Screen - The size of the window needs to be resized to display all the information
4525	When trying to post edit or endorsement system will create duplicate policies when hitting enter on notes screen
4560	Search - Financial Entity. Received "The page cannot be found" error after deleting a contact or location
4591	Close Period - The period closing module is failing to create the closing journal entries (ie income and expense to retained earnings).
4696	Last updated by is incorrect when reversing invoices
4702	Two transaction records that have credit assigned to the payment are still appearing as available
4731	Cannot post an invoice for Pueblo Hotel Supply
4737	User tried to reverse a payment advance, the screen refreshed but no reversal is shown and the Reverse button is now inactive
4738	Bank account accounting transaction search - Entering in a second sort criteria will not return the requested filtered data
4744	Org63-AP permits out of balance entry
4747	Accounts payable - reversal records do not ahve the right ID format
4751	Trial Balance - Need to show ending balances
4754	Balance Sheet Details - Not Grouping Properly
4768	User has submitted two endorsements on two separate clients and they were only sent to history when no active policies listed.
4769	Edited a policy and now is no longer active
4775	Batch Summary History Tab - Clicking into this tab results in a NexsureX error
4778	Commercial property marketing app for First Broadcasting is printing the premises locations incorrectly on the accord 125 schedule
4781	Account Current Report - Premium not displaying on report for invoice 1269.
4782	Account Current Report - The 'Premium Amount' and 'Agent % Comm' fields data are overlapping when the Agent % Comm is 'Flat'.
4783	Incorrect balance for client Loco Wine & Liquor
4784	Bank setup search - The 'Search' and 'OK' buttons are disabled when a search is done that does not return any results
4793	Invoice Trans Reg - Change posting status default to posted
4796	Cannot post an edit for a policy
4800	Payment Advance error when apply residual credit to the payment advance transaction
4802	Error adding an agency commission to an invoice
4803	Receive Payment - 'Date' and 'Description' not displaying for fees and taxes in the invoice selection screen.
4808	Problem Reversing Invoices: Reversal is not posting so Trial Balance amounts

	are off
4810	Endorsement not displayed on one policy
4812	If the status of the Endorsement was never changed to submitted, you should have the capability to Abort the pending endorsement
4837	GL Number entered by client were deleted by data conversion
4842	Missing ACORD 24 and 27 certificates
4843	SCA: cannot assign credit to Advance Payment transactions in receipt with residual amount. Ref bug#4800
4844	Edit Policy - Editing a policy removes the PDR created for this policy
4845	when you have 100 drivers the driver overflow form prints only 10's
4846	Receive payment - in payment id #98, cannot assign credit
4864	ACORD 127 IA - binder data flow the UM section the 127 only has 2 limits yet on the binder it creates a / as if there were another number that is suppost to populate
4866	Dataflow - Adding, Editing, or Deleting a schedule record does not get populated the Change Request form.
4867	Binder Dataflow- The coverages are not being populated on the binder.
4877	People Payables - Subtotals not right

Service Pack 05-14-04

BUG ID	DESCRIPTION
3677	Book of Business - Change Estimated premium and commissions to read from PDR
4124	Policies - I was able to delete a policy with attached certs
4269	Card file - the policies that have pending servicing or in future status do not show on the card file
4344	Additional Interest - Adding an additional interest the address is not required but when editing it is required
4370	Servicing - incorrect action when clicking "Back" and "Next"
4448	Form schedule exporting via email - doesn't show up on the delivery screen
4470	Book of Business - Report is returning is stage other than policy, only policy should return
4579	Setup opportunities screen - grade default is incorrect
4726	Book of Business - Report Times out
4791	Reports: Tax Authority Payables report displaying tax multiple times (x number of named insureds)
4797	Servicing endorsement - when you have a submitted endorsement if you select save changes it blanks out the screen
4849	Client Mailing Labels - Not returning all clients
4852	Home expirations screen - after receiving error message link takes to Actions screen
4868	Post Accounts Payable dialog has Accounts Payable written out as accounts Payable

4869	Customer Statement report
4870	Cannot post invoices due to system stating it is a closed period when in fact the period is not closed
4884	Fax notification coming through with a Pacific notification time
4894	SCA: cannot pull an account current report for April
4899	BOP appears in NavBar but no BOP is on policy (Hotfix)

Service Pack 05-28-04

BUG ID	DESCRIPTION
4339	Production Criteria - When Commission Min or Max is chosen only commission amout returns
4406	Vendor Payables - Paid, unpaid or all drop down in criteria is ignored
4470	Book of Business - Report is returning is stage other than policy, only policy should return
4706	Reports - Accounting - Tax Authority Payable - Changing the sort field to Transaction Effective Date causes an error
4707	Reports - Accounting - Vendor Payable - When you sort by AMOUNT it causes an error
4708	Reports - Management - Book of Business: changing sort field to BILL METHOD and submitting causes an error
4791	Reports: Tax Authority Payables report displaying tax multiple times (x number of named insureds)
4947	Client Listing - Add Referred by as a Filter
4948	Opportunities Summary - Need to add Referred by as a grouping
4949	Opportunities Detail - Need to add Referred by as a grouping
4950	Marketing Policies - Need to add Referred by as a grouping
4951	Marketing Results - Need to add Referred by as a grouping
4965	DB Comm Rec - Subtotals and Grand total wrong
5030	When printing invoice in contemporary style, carrier name is cut off
4632	Employee Security - A reactivated "Deactivated" employee can not be "deactivated" again
4767	Black header when enforcing marketing policies (HOTFIX)
4778	Commercial Property marking app for First Broadcasting is printing the premises locations incorrectly
4804	Receive payments - Posted payment items have the "Add New" link still available
4857	User Rights Template for servicing still has the Quote/Add option which is not available
4860	Lookup - on the dwelling and fire the lookup says "No lookup available for this section"
4865	Chart of accounts - The account balance updated date has been set to 1/1/1900
4869	Customer Statement report incorrect, doesn't match aged receivables
4889	JDW: Flood policy is not available to be added to Cert 24

4946	Duplicate client records (HOTFIX)
4968	The Lookup feature on ACORD 125 prefills Other Named Insured twice
5000	Verification Auto ID - Cannot use a different sate ACORD once one has been generated
5048	Endorsement sent policy to history (HOTFIX)
5059	Marketing - I am unable to delete an empty marketing policy

Contact Information

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