



Nexsure 1.1.2.008 Release Notes Monday, June 21, 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 1.1.2.008, 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; 64 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.

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 1.1.2.008

The previous version of Nexsure was 1.1.1.007. This is a list of new features that are available in 1.1.2.008.

XDTI #	Category	Sub-Topic	Enhancement Description
3	Accounting	Accounts Payable	Accounts Payable Auto Process on Due date
135	CRM	Clients	Implement Task Log to track events on client's file
143	CRM	Clients	*Interrupt feature, go back to previous spot (bookmark)
384	Policy	Summary	Display bill method on policy listing (Agency Bill/Direct Bill)
389	Policy	Workflows	Certificates - Renewal workflow
438	Reports	Clients	Mailing Labels - needs selection and sort criteria & Avery label options (See Word)
481	Home	Marketing	*Context tool needs to include ability to push to history. Context tool needs to be exposed from Home screen view
521	Policy	Workflows	Revised cancellation workflows to include ability to describe cancellation & enter eff. date at beginning of process
522	Policy	Workflows	Revised audit workflows to include ability to describe audit & enter eff. date at beginning of process
523	Policy	Workflows	Revised claim workflows to include ability to describe claim & enter eff. date at beginning of process
524	Policy	Workflows	Revised edit workflows to include ability to describe edit & enter eff. date at beginning of process
551	Home	Expirations	Context tool (right click details without blue border options display) needs to include ability to push to history.
552	Home	Expirations	Context tool (right click details without blue border options display) needs Open functionality that displays policy
553	Home	Expirations	Context tool (right click details without blue border options display) needs Print Policy functionality
555	Home	Expirations	Context tool (right click details without blue border options display) needs Create policy edit functionality
556	Home	Expirations	Context tool (right click details without blue border options display) needs Create Endorsement functionality

XDTI #	Category	Sub-Topic	Enhancement Description
557	Home	Expirations	Context tool (right click details without blue border options display) needs Create Claim functionality
558	Home	Expirations	Context tool (right click details without blue border options display) needs Create Cancellation functionality
559	Home	Expirations	Context tool (right click details without blue border options display) needs Re-market policy functionality
560	Home	Expirations	Context tool (right click details without blue border options display) needs Renew policy functionality
561	Home	Expirations	Context tool (right click details without blue border options display) needs Create Audit functionality
562	Policy	Actions	Context tool (right click details without blue border options display) needs open functionality
563	Policy	Actions	Context tool (right click details without blue border options display) needs Mark as closed functionality.
565	Policy	Actions	Context tool (right click details without blue border options display) needs Add New Action functionality.
566	Home	Actions	Context tool (right click details without blue border options display) needs open functionality
567	Home	Actions	Context tool (right click details without blue border options display) needs Mark as closed functionality.
568	Home	Actions	Context tool (right click details without blue border options display) needs Print policy functionality.
569	Home	Actions	Context tool (right click details without blue border options display) needs Add New Action functionality.
579	Home	Binder	Context tool (right click details without blue border options display) needs open functionality
580	Home	Binder	Context tool (right click details without blue border options display) needs Print Binder functionality.
582	Home	Binder	Context tool (right click details without blue border options display) needs Create Policy Edit functionality.
583	Home	Binder	Context tool (right click details without blue border options display) needs Create Endorsement functionality.
584	Home	Binder	Context tool (right click details without blue border options display) needs Create Claim functionality.
585	Home	Binder	Context tool (right click details without blue border options display) needs Re-market functionality.
586	Home	Binder	Context tool (right click details without blue border options display) needs Renew Policy functionality.

XDTI #	Category	Sub-Topic	Enhancement Description
587	Home	Binder	Context tool (right click details without blue border options display) needs Create Audit functionality.
595	Home	Cancellation	Context tool (right click details without blue border options display) needs Open functionality.
596	Home	Cancellation	Context tool (right click details without blue border options display) needs Print Cancellation functionality.
598	Home	Cancellation	Context tool (right click details without blue border options display) needs Create Endorsement functionality.
599	Home	Cancellation	Context tool (right click details without blue border options display) needs Create Claim functionality.
600	Home	Cancellation	Context tool (right click details without blue border options display) needs Re-market Policy functionality.
601	Home	Cancellation	Context tool (right click details without blue border options display) needs Create Audit functionality.
602	Policy	Claims	Context tool (right click details with blue border options display) needs Display Claims functionality.
603	Policy	Claims	Context tool (right click details with blue border options display) needs Add Claim functionality.
604	Policy	Claims	Context tool (right click details without blue border options display) needs Open functionality.
605	Policy	Claims	Context tool (right click details without blue border options display) needs Print Claim functionality.
606	Home	Claims	Context tool (right click details without blue border options display) needs Display Claims functionality.
607	Home	Claims	Context tool (right click details without blue border options display) needs Add Claim functionality.
608	Home	Claims	Context tool (right click details without blue border options display) needs Open functionality.
609	Home	Claims	Context tool (right click details without blue border options display) needs Print Claim functionality.
610	Client	Marketing	Context tool (right click details options display) needs Open functionality.
613	Client	Marketing	Context tool (right click details options display) needs Print Policy functionality.
614	Client	Marketing	Context tool (right click details options display) needs Re-Market functionality.
616	Home	Marketing	Context tool (right click details without blue border options display) needs Open functionality.
618	Home	Marketing	Context tool (right click details without blue border options display) needs Print Policy functionality.

XDTI #	Category	Sub-Topic	Enhancement Description
619	Home	Marketing	Context tool (right click details without blue border options display) needs Re-Market functionality.
624	Home	Audits	Context tool (right click details with blue border options display) needs Add New Marketing policy functionality.
625	Home	Audits	Context tool (right click details without blue border options display) needs Open functionality.
627	Home	Audits	Context tool (right click details without blue border options display) needs Print Policy functionality.
628	Home	Audits	Context tool (right click details without blue border options display) needs Re-Market functionality.
631	Home	Edits	Context tool (right click details without blue border options display) needs Open functionality.
632	Home	Edits	Context tool (right click details without blue border options display) needs Print Policy functionality.
644	Home	Endorsements	Context tool (right click details without blue border options display) needs Open functionality that displays policy
645	Home	Endorsements	Context tool (right click details without blue border options display) needs Print Change Request functionality
647	Home	Endorsements	Context tool (right click details without blue border options display) needs Add Binder functionality
648	Home	Endorsements	Context tool (right click details without blue border options display) needs Create policy edit functionality
649	Home	Endorsements	Context tool (right click details without blue border options display) needs Create Endorsement functionality
650	Home	Endorsements	Context tool (right click details without blue border options display) needs Create Claim functionality
651	Home	Endorsements	Context tool (right click details without blue border options display) needs Create Cancellation functionality
652	Home	Endorsements	Context tool (right click details without blue border options display) needs Re-market policy functionality
653	Home	Endorsements	Context tool (right click details without blue border options display) needs Renew policy functionality
654	Home	Endorsements	Context tool (right click details without blue border options display) needs Create Audit functionality
655	Policy	Client	Context tool (right click details without blue border options display) needs Open functionality that displays policy
656	Policy	Client	Context tool (right click details without blue border options display) needs Print functionality

XDTI #	Category	Sub-Topic	Enhancement Description
659	Policy	Client	Context tool (right click details without blue border options display) needs Create Binder functionality
661	Policy	Client	Context tool (right click details without blue border options display) needs Create policy edit functionality
662	Policy	Client	Context tool (right click details without blue border options display) needs Create Endorsement functionality
663	Policy	Client	Context tool (right click details without blue border options display) needs Create Claim functionality
664	Policy	Client	Context tool (right click details without blue border options display) needs Create Cancellation functionality
665	Policy	Client	Context tool (right click details without blue border options display) needs Re-market policy functionality
666	Policy	Client	Context tool (right click details without blue border options display) needs Renew policy functionality
667	Policy	Client	Context tool (right click details without blue border options display) needs Create Audit functionality
669	Home	Interface	Context tool (right click details options display) needs Open functionality
670	Home	Interface	Context tool (right click details options display) needs Print Policy functionality
671	Home	Interface	Context tool (right click details options display) needs Accept functionality
672	Home	Interface	Context tool (right click details options display) needs Reject functionality
673	Home	Interface	Context tool (right click details options display) needs Search functionality
674	Home	Interface	Context tool (right click details options display) needs View AL3 functionality
676	Client	Opportunities	Context tool (right click details without blue border options display) needs Open functionality
677	Client	Opportunities	Context tool (right click details without blue border options display) needs Market functionality
678	Client	Opportunities	Context tool (right click details without blue border options display) needs Print Policy functionality
679	Client	Opportunities	Context tool (right click details without blue border options display) needs Add New Line of Business functionality
680	Home	Opportunities	Context tool (right click details with blue border options display) needs Add New Opportunity functionality
681	Home	Opportunities	Context tool (right click details without blue border options display) needs Open functionality
682	Home	Opportunities	Context tool (right click details without blue border options display) needs Market functionality

XDTI #	Category	Sub-Topic	Enhancement Description
683	Home	Opportunities	Context tool (right click details without blue border options display) needs Print Policy functionality
684	Home	Opportunities	Context tool (right click details without blue border options display) needs Add New Line of Business functionality
729	Interface	Downloads	*New Interface Screen
730	Interface	Search	*Advanced Search Feature
731	Interface	Downloads	*Details Screen
777	Reports	Certificates	*Certificate Holder Export to Excel (buggy #4582)
779	Interface	Downloads	*Cancellations with dates in the future in as pending
780	Forms	64TX	Texas Windstorm Insurance Association - Application for Windstorm and Hail Insurance
781	Forms	68FL	Citizens Property Insurance Corporation, Residential - Dwelling Wind Only
782	Forms	69FL	Citizens Property Insurance Corporation, Wind Only Supplemental Residential Application Schedule
783	Forms	69TX	Texas Special Mobile Home Windstorm & Hail Application - Texas Windstorm Insurance Association
784	Forms	90AK	Alaska Personal Auto Application
785	Forms	90AR	Arkansas Personal Auto Application
786	Forms	90DC	District of Columbia Personal Auto Application
787	Forms	90DE	Delaware Personal Auto Application
788	Forms	90GA	Georgia Personal Auto Application
789	Forms	90HI	Hawaii Personal Auto Application
790	Forms	90ID	Idaho Personal Auto Application
791	Forms	90KY	Kentucky Personal Auto Application
792	Forms	90LA	Louisiana Personal Auto Application
793	Forms	90MS	Mississippi Personal Auto Application
794	Forms	90ND	North Dakota Personal Auto Application
795	Forms	90NM	New Mexico Personal Auto Application
796	Forms	90RI	Rhode Island Personal Auto Application
797	Forms	90SD	South Dakota Personal Auto Application
798	Forms	90VI	Virgin Islands Personal Auto Application
799	Forms	90VT	Vermont Personal Auto Application
800	Forms	90WV	West Virginia Personal Auto Application
801	Forms	90WY	Wyoming Personal Auto Application
802	Forms	127AK	Alaska Commercial Auto
803	Forms	127AL	Alabama Commercial Auto
804	Forms	127AR	Arkansas Commercial Auto

XDTI #	Category	Sub-Topic	Enhancement Description
805	Forms	127AZ	Arizona Commercial Auto
806	Forms	127DC	District of Columbia Commercial Auto
807	Forms	127DE	Delaware Commercial Auto
808	Forms	127GA	Georgia Commercial Auto
809	Forms	127HI	Hawaii Commercial Auto
810	Forms	127IA	Iowa Commercial Auto
811	Forms	127ID	Idaho Commercial Auto
812	Forms	127KS	Kansas Commercial Auto
813	Forms	127KY	Kentucky Commercial Auto
814	Forms	127LA	Louisiana Commercial Auto
815	Forms	127ME	Maine Commercial Auto
816	Forms	127MS	Mississippi Commercial Auto
817	Forms	127MT	Montana Commercial Auto
818	Forms	127ND	North Dakota Commercial Auto
819	Forms	127NE	Nebraska Commercial Auto
820	Forms	127NH	New Hampshire Commercial Auto
821	Forms	127NM	New Mexico Commercial Auto
822	Forms	127NV	Nevada Commercial Auto
823	Forms	127OK	Oklahoma Commercial Auto
824	Forms	127RI	Rhode Island Commercial Auto
825	Forms	127SC	South Carolina Commercial Auto
826	Forms	127SD	South Dakota Commercial Auto
827	Forms	127VT	Vermont Commercial Auto
828	Forms	127WV	West Virginia Commercial Auto
829	Forms	127WY	Wyoming Commercial Auto - Coverages Limits Section
830	Forms	127WA	Washington Commercial Auto Coverages/Limits Section
831	Forms	130	Workers Compensation Application - add overflow
832	Forms	130FL	Florida Workers Compensation Application
833	Forms	132AK	Truckers
834	Forms	132AR	Truckers
835	Forms	132DC	Truckers
836	Forms	132DE	Truckers
837	Forms	132GA	Truckers
838	Forms	132HI	Truckers
839	Forms	132IA	Truckers
840	Forms	132ID	Truckers

XDTI #	Category	Sub-Topic	Enhancement Description
841	Forms	132KS	Truckers
842	Forms	132KY	Truckers
843	Forms	132LA	Truckers
844	Forms	132ME	Truckers
845	Forms	132MS	Truckers
846	Forms	132MT	Truckers
847	Forms	132ND	Truckers
848	Forms	132NE	Truckers
849	Forms	132NM	Truckers
850	Forms	132RI	Truckers
851	Forms	132SC	Truckers
852	Forms	132SD	Truckers
853	Forms	132VT	Truckers
854	Forms	132WV	Truckers
855	Forms	132WY	Truckers
856	Forms	138AK	Alaska Garage and Dealers
857	Forms	138AL	Alabama Garage and Dealers
858	Forms	138AR	Arkansas Garage and Dealers
859	Forms	138AZ	Arizona Garage and Dealers
860	Forms	138DC	District of Columbia Garage and Dealers
861	Forms	138DE	Delaware Garage and Dealers
862	Forms	138GA	Georgia Garage and Dealers
863	Forms	138HI	Hawaii Garage and Dealers
864	Forms	138IA	Iowa Garage and Dealers
865	Forms	138ID	Idaho Garage and Dealers
866	Forms	138KS	Kansas Garage and Dealers
867	Forms	138KY	Kentucky Garage and Dealers
868	Forms	138LA	Louisiana Garage and Dealers
869	Forms	138ME	Maine Garage and Dealers
870	Forms	138MS	Mississippi Garage and Dealers
871	Forms	138MT	Montana Garage and Dealers
872	Forms	138ND	North Dakota Garage and Dealers
873	Forms	138NE	Nebraska Garage and Dealers
874	Forms	138NH	New Hampshire Garage and Dealers
875	Forms	138NM	New Mexico Garage and Dealers
876	Forms	138NV	Nevada Garage and Dealers

XDTI #	Category	Sub-Topic	Enhancement Description
877	Forms	138OK	Oklahoma Garage and Dealers
878	Forms	138RI	Rhode Island Garage and Dealers
879	Forms	138SC	South Carolina Garage and Dealers
880	Forms	138SD	South Dakota Garage and Dealers
881	Forms	138UT	Utah Garage and Dealers
882	Forms	138VT	Vermont Garage and Dealers
883	Forms	138WA	Washington Garage and Dealers
884	Forms	138WV	West Virginia Garage and Dealers
885	Forms	138WY	Wyoming Garage and Dealers - Coverages/Limits Section
886	Forms	193	Open Cargo Section
887	Forms	220FL	Citizens Property Insurance Corporation, Commercial and Commercial - Residential Wind Only Application
888	Forms	221FL	Citizens Property Insurance Corporation, Wind Only Supplemental Commercial and Commercial - Residential Application Schedule
889	Forms	CUSTOM-017	Performance & Payment Bond
890	Forms	CUSTOM-018	License and Permit Bond
891	Forms	CUSTOM-019	Directors & Officers Liability
892	Forms	CUSTOM-026	Products Pollution Liability
893	Forms	CUSTOM-030	Special Events Insurance
894	Accounting	Vendor	*Enable user, as they are associating a vendor to organization, to select default address based on the addresses entered for the vendor in the CRM. (required for E3)
909	CRM	Security	*Move User Rights Template to Security Administration
913	Accounting	Accounts Payable	Add functionality to accounts payable that permits selection of alternative address from default address.
916	Reports	Policies	*Coverage Rounding Report (added 4/19/04 per Brad)
917	Policy	Claims	Add LOB to claims screen (needed for reporting)
918	Policy	Annotations	Implement Annotations related to actions
919	Interface	Downloads	MetLife Auto & Home Personal Auto
920	Interface	Downloads	MetLife Auto & Home Homeowners
921	Interface	Downloads	MetLife Auto & Home Personal Umbrella
922	Interface	Downloads	MetLife Auto & Home Watercraft
923	Interface	Downloads	Vesta Home
924	Interface	Downloads	Vesta Dwelling Fired

XDTI #	Category	Sub-Topic	Enhancement Description
925	Interface	Downloads	Vesta Personal Umbrella
926	Interface	Downloads	Fredrick Homeowners
927	Interface	Downloads	Frankenmuth Dwelling Fire
928	Interface	Downloads	Frankenmuth Personal Umbrella
929	Interface	Downloads	Foremost Homeowners (mobile home)
930	Interface	Downloads	Foremost Dwelling fire (mobile home)
931	Interface	Downloads	Foremost Personal Auto (motorhome/rv)
932	Interface	Downloads	EMC/Employers Mutual Personal Auto
933	Interface	Downloads	EMC/Employers Mutual Homeowners
934	Interface	Downloads	EMC/Employers Mutual Dwelling Fire
935	Interface	Downloads	Dairyland/Sentry Personal Auto
936	Interface	Downloads	Commerce Homeowners
937	Interface	Downloads	Citizens Inland Marine
938	Interface	Downloads	Allstate Personal Auto
939	Interface	Downloads	Allstate Homeowners
956	CRM	Login	*Increase time out feature to 4 hours
963	Office Integration	Actions	*Ability to push a button and upload action into Outlook Calendar
976	Policy	Certificates	*allow insureds access to update cert holder list
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
997	Policy	Claims	separate claims tab from policy info screen
998	Interface	Downloads	*add carrier sequence ID
999	Forms	Carrier Address	*Carrier address needs to pull over to EPI
1000	Interface	Downloads	Donegal – Home
1001	Interface	Downloads	Encompass – Auto
1002	Interface	Downloads	Encompass - Home
1003	Interface	Downloads	Employers Mutual – Umb
1004	Interface	Downloads	Southern Family – Home
1005	Interface	Downloads	Hingham – Home
1006	Interface	Downloads	Hingham - DF
1007	Interface	Downloads	Allied - DF

XDTI #	Category	Sub-Topic	Enhancement Description
1008	Forms	Carrier Address	*Carriers address needs to pull over to LPR
1021	Home	Edits	*Context tool (right click details without blue border options display) needs post edit
1022	Home	Edits	*Context tool (right click details without blue border options display) needs abort edit
1023	Home	Cancellation	*Context tool (right click details without blue border options display) needs post cancellation
1024	Home	Cancellation	*Context tool (right click details without blue border options display) needs abort cancellation
1025	Home	Claims	*Context tool (right click details without blue border options display) needs post claim
1026	Home	Claims	*Context tool (right click details without blue border options display) needs abort claim
1027	Home	Audits	*Context tool (right click details without blue border options display) needs post audit
1028	Home	Audits	*Context tool (right click details without blue border options display) needs abort audit
1029	Home	Endorsements	*Context tool (right click details without blue border options display) needs post endorsement
1030	Home	Endorsements	*Context tool (right click details without blue border options display) needs abort Endorsement
1031	Home	Actions	*Context tool (right click details with blue border options display) needs Open functionality
1032	Home	Actions	*Context tool (right click details with blue border options display) needs market new lob
1033	Home	Actions	*Context tool (right click details with blue border options display) needs add certificate
1034	Home	Actions	*Context tool (right click details with blue border options display) needs add verification
1035	Home	Actions	*Context tool (right click details with blue border options display) needs add new opportunity
1036	Home	Audits	*Context tool (right click details with blue border options display) needs Open
1037	Home	Audits	*Context tool (right click details with blue border options display) needs add certificate
1038	Home	Audits	*Context tool (right click details with blue border options display) needs add verification
1039	Home	Audits	*Context tool (right click details with blue border options display) needs add new opportunity
1040	Home	Opportunity	*Context tool (right click details with blue border options display) needs Open
1041	Home	Opportunity	*Context tool (right click details with blue border options display) needs market new lob
1042	Home	Opportunity	*Context tool (right click details with blue border options display) needs add new opportunity
1043	Home	Marketing	*Context tool (right click details with blue border options display) needs Open

XDTI #	Category	Sub-Topic	Enhancement Description
1044	Home	Marketing	*Context tool (right click details with blue border options display) needs market new lob
1045	Home	Marketing	*Context tool (right click details with blue border options display) needs add new opportunity
1046	Home	Binder Log	*Context tool (right click details with blue border options display) needs Open functionality
1047	Home	Binder Log	*Context tool (right click details with blue border options display) needs market new lob
1048	Home	Binder Log	*Context tool (right click details with blue border options display) needs add certificate
1049	Home	Binder Log	*Context tool (right click details with blue border options display) needs add verification
1050	Home	Binder Log	*Context tool (right click details with blue border options display) needs add new opportunity
1051	Home	Edits	*Context tool (right click details with blue border options display) needs Open functionality
1052	Home	Edits	*Context tool (right click details with blue border options display) needs market new lob
1053	Home	Edits	*Context tool (right click details with blue border options display) needs add certificate
1054	Home	Edits	*Context tool (right click details with blue border options display) needs add verification
1055	Home	Edits	*Context tool (right click details with blue border options display) needs add new opportunity
1056	Home	Expirations	*Context tool (right click details with blue border options display) needs Open functionality
1057	Home	Expirations	*Context tool (right click details with blue border options display) needs market new lob
1058	Home	Expirations	*Context tool (right click details with blue border options display) needs add certificate
1059	Home	Expirations	*Context tool (right click details with blue border options display) needs add verification
1060	Home	Expirations	*Context tool (right click details with blue border options display) needs add new opportunity
1061	Home	Endorsements	*Context tool (right click details with blue border options display) needs Open functionality
1062	Home	Endorsements	*Context tool (right click details with blue border options display) needs market new lob
1063	Home	Endorsements	*Context tool (right click details with blue border options display) needs add certificate
1064	Home	Endorsements	*Context tool (right click details with blue border options display) needs add verification
1065	Home	Endorsements	*Context tool (right click details with blue border options display) needs add new opportunity
1066	Home	Cancellation	*Context tool (right click details with blue border options display) needs Open functionality
1067	Home	Cancellation	*Context tool (right click details with blue border options display) needs market new lob
1068	Home	Cancellation	*Context tool (right click details with blue border options display) needs add certificate

XDTI #	Category	Sub-Topic	Enhancement Description
1069	Home	Cancellation	*Context tool (right click details with blue border options display) needs add verification
1070	Home	Cancellation	*Context tool (right click details with blue border options display) needs add new opportunity
1071	Home	Claims	*Context tool (right click details with blue border options display) needs Open functionality
1072	Home	Claims	*Context tool (right click details with blue border options display) needs market new lob
1073	Home	Claims	*Context tool (right click details with blue border options display) needs add certificate
1074	Home	Claims	*Context tool (right click details with blue border options display) needs add verification
1075	Home	Claims	*Context tool (right click details with blue border options display) needs add new opportunity
1076	Policy	Certificates	*Color code headers for certificates - issued and non-issued
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
1086	Security	T-Log	*Add security to T-Log menu at client level
1087	Security	T-Log	*Add Security to T-Log menu in Setup, Security Administration
1088	CRM	Additional Interest	*Add primary contact designation to AI contacts so cert e-mail delivery will pull from e-mail address of this contact (not required but can be changed)
1089	Policy	Policy Info	*Add agency/direct bill designation
			*Items not originally scheduled for release in Version 1.1.2

Resolved Issues

Service Pack 06-04-04

BUG ID	DESCRIPTION
4473	attachments - when adding an attachment if you blank out the created date field then save it defaults to 1/1/1900
4874	Carrier address not populating ACORD 27 certificate
4986	Second line of Cert Holder address is not populating a certificate
5009	Phone number does not appear on card file for a client by default
5017	servicing - marketing if you click history and the pop up comes up then you hit the X to close the pop up then click save changes it sends tht policy to history
INTERFACE BUGS	
4243	The customer states the following (but please note the client seems to be entered in multiple times into Nexsure): Dean and Dorothy Halvorson have 3 client entries
4548	A policy that has been downloaded that is rewritten does not show up on the card file.
4675	Email addresses being copied over by downloads
4891	Contact Info being over written by the download process
4942	Interface filter not working
4971 (E694)	Automatically transfer files that have been manually downloaded out of the download folder to a history download folder
5049	Assignments are added to downloads when they are already assigned
N/A	Remove the checkboxes so that clients can only except client exceptions though the search and not mass exception
HOTFIXES	
4878	BB Invoices posting to Beginning Client Balance GL account at org level but BB Journal Entry is done at territory level. When numbers roll up to org level, overall balance from BB invoices is off.
4896	JDW Reversed invoice shows status as "unposted reversed"
4897	User endorsed a package policy and now there is no active policy, just the one sent to history
4900	Data conversion questions
4970	Reversed disbursement that had created an advance payment invoice is not creating a POSTED reversal invoice so he cannot clear out the original invoice from receipts.
4985	A posted endorsement was sent to history, but no policy remains in force. Policy #BinderIM133036
4991	Invoice will did not reverse, shows status of Reversed/Unposted.
5006	A number of transactions that show "Unposted Reverse" on the Client summary view
5044	Policy has been sent to History when posting an endorsement
5048	Endorsement sent policy to History
5060	Client - Clicking on the details for a client and received a VB script error
5069	Servicing – Renew - When trying to renew a dwelling fire policy, the renew policy is

	empty
5070	Renewal for Dwelling & Fire app status is "Empty"
5085	Client policy shows an endorsement is "Submitted" but no endorsement is displayed

Service Pack SP 06-07-04

BUG ID	DESCRIPTION
5102	Cannot print remittance advice a summary for reconciliations.
5107	Cannot post accounting transactions
5111	Lost actions for client (HOTFIX)
5100	Log off due to time out - The time on inactivity is still set to 1 hour, but due to a v1.1.2 enhancement it should be 4 hours.

Service Pack SP 06-09-04

BUG ID	DESCRIPTION
5109	Cannot sync Outlook calendar to Actions
5122	Exceptions are stuck on processing.
5126	Outlook email bodies do not attach with PC's running Office 2000
(No Buggy Ref)	eServices fix for EMC. The client was not able to access some policies.
5066	Outlook attachments – attachment contain from and subject but does not have the body of the message

Hotfixes

BUG ID	DESCRIPTION
4124	policies - i was able to delete a policy with attached certs
5148	delivery - i sent and email thru delivery and it still says processing forms.
5136	Pierce/RHSH/Gaffney: Three agencies report all open actions are gone from system
5131	Users received" Exceeded maximum amount of users" when no one was able to log in
5129	Sun: Home-Expirations and Expirations report are not pulling policies that were brought into Nexsure via data conversion
5069	Servicing – Renew – When trying to renew a dwelling fire policy, the new policy is empty
5088	Cannot renew a policy for client, receive VBS error
5071	Endorsements missing from policy

Service Pack SP 06-18-04

BUG ID	DESCRIPTION
4983	Reversed Reconciliations - JDW has a reversed reconciliation record that did not post.
5066	Outlook attachment - Attachment contains from and subject, but does not have the body of the message
5102	Cannot print remittance advice a summary for reconciliations.
5103	Disbursements - Auto Accounts Payable disbursements do not have the dollar and cents printed on the checks.
5126	Outlook email bodies do not attach with PC's running Office 2000
5132	Disbursements - Check stock 80180 and 80971 are not printing the carrier address on the check.
5188	Interface search does not return existing client record
5142	After you save an Outlook message, your original org menus are displayed along with the Nexsure
5145	When creating a document using a template, you are prompted to "Save Document Template" even though it's not a template
5166	Cash Disbursement - reversing cash disbursement receive error "Period may be locked or closed"
5175	Unable to email deliveries to 2 clients
5209	Bogus PDR records created in Org
N/A	eServices update to correct issue with Hartford website
REPORTS	
3180	Invoice / Bill to - When using a Finance Co as a "Bill To" the client name does not appear on the invoice 80626
5005	Account Current - Commission percent is rounding
5064	Active X error in the People Payables Report when you select "Agency Commissions" in the sort criteria
5196	Accounts receivable - Cash receipts to other than AR GL account are showing on report
HOTFIXES	
5048	Endorsement sent policy to History
5071	Endorsement missing from policy
5085	Client policy shows an endorsement is submitted but no endorsement is displayed
5088	Cannot renew a policy for a client, receive VBS error
5105	Endorsements today, they would not post and then went to history.
5119	User called to report that he is unable to remove a duplicate client record
5129	Sun: Home expirations and expirations report are not pulling policies that were brought into Nexsure via data conversion
5130	Invoices showing unposted/reversed data
5136	Pierce/RSH/Ganey: Three agencies report all open actions are gone from system
5163	Dority: Converted policies are not displaying in Home expirations screen
5178	An endorsement when posted was sent to history but no policy remained active
5180	Multiple unposted/reversed items
5185	Policy sent to history after endorsement

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