Nexsure Release Notes

Version 1.3.3

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.3.3, 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.

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Section 2: System 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 of 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 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 for full use of Nexsure including Office Integration

Windows 2000 professional or Windows XP professional only 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)

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**

Contact Information

Please forward any comments, suggestions, or questions about the information contained in this document to the document author listed on the cover page.

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Section 3: What's New in Version 1.3.3

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Office Integration	**Delivery**	Added ability to enter remarks for a fax cover page.
Office Integration	**Delivery**	Added subject line for fax delivery.
CRM	**Delivery**	Resend button for fax and email delivery added.
Reports	**Accounting**	Production Report includes the mode (New/Renew - done) and premium descends as a grouping.
Reports	**Accounting**	Trial Balance - Added ability to sort by GL account level. Includes additional information (beginning balance, current month's activity and ending balance for current YR and Last YR)
Reports	**Accounting**	Accounts Receivable Aging - added Last Payment Date and amount to the Aged Receivable Report.
Reports	**Accounting**	Statements: Added ability to run customer statements with the following options: • All • Excluding Credit balances • Excluding -0- Balances • Excluding Both Credit and -0- Balances
Interface	**Downloads**	Prevent policies with a status of **New** from downloading and adding to a client that already has a policy.

Resolved Issues

- Deposit ID displays the proper deposit amount.
- Editing an in force package policy to add a carrier fee to the policy info tab now displays multiple people commissions.
- Carrier fee is available during disbursement.
- Invoices now post in balance with installments.
- Billing carriers are available to select when doing carrier cash receipts.
- Tax authority disbursement from reconciliation posts properly.
- Reconciliation resulting in receipt from carrier displays properly.
- Breaking down premium on transaction for the same policy now adds all premiums and updated policy information.
- Reversing a reconciliation in a closed/locked month corrected.
- Posting an invoice into a closed/locked period will post the reversal into the current opened period, now displays confirmation message.
- Reversing Receive Payment in closed or locked month can now attach NSF fee.
- Clicking Update Balances on the General Ledger screen updates balances.
- Servicing a policy 'black header' issue has been corrected.
- Unposted receipts can be cleared from deposits.
- Receivables and Payables tabs now available when viewing invoice detail on installments
- Disbursement IDs 1 and 2 with same data as that shown in reconciliation ID6 are now visible.
- Deposit posted to Agency Bill General Ledger account issue has been resolved.
- Unit is present when creating an invoice, no longer needs to be reselected if editing an invoice header.

- Summary View of Client Transactions displays invoices and payment.
- Opportunities can now be added for a package policy.
- Producers can now be added to the assignment tab at the policy level.
- All payments are being displayed on the Client/Payment Summary screen.
- Carrier Statement transaction records amount and amount paid display properly.
- Clicking Update Account Balances updates properly.
- Servicing – locked for editing issue has been resolved.
- Phone numbers can now be added to Vendors.
- Delete LOB in marketing and adding different LOB now displays correctly.
- Post Invoice – The Post link remains active if the "No" option is selected.
- Disbursement header information available when creating a new disbursement.
- When selecting journal entries to be deleted, only the selected journal entries are deleted.
- Entering "all LOB" for agency commissions now shows all LOB's on the Policy info Screen.
- Policy Info - Branch Commission Delete Foreign Key Constraint resolved.
- ACORD 140 - Locations now available from premises info.
- Adding a cash receipt to a carrier reconciliation works properly.
- Employee Receive Payment - Name is now pulling into header.
- Using right-click feature to create endorsement works correctly.
- Migrating from ACORD 130 form now includes the 1st premise.
- Save button now refreshes the screen when adding an assignment.
- Search by phone number now returns results if the phone is associated with the client contact.