



Nexsure Release Notes

Version 1.3.4

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Author(s):

Business Analyst Team

QA Team

Documentation Department

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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.

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 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 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.

Corporate Headquarters	Technology Center
XDimensional Technologies, Inc. 145 South State College Suite 160 Brea, California 92821 Phone: 800.789.2567 Phone: 714.672.8900 Fax: 714.672.8908 Web: www.xdti.com	XDimensional Technologies, Inc. 450A Apollo St. Brea, California 92821 Phone: 800.789.2567 Phone: 714.672.8900 Fax: 714.672.8908 Web: www.xdti.com

Section 3: What's New in Version 1.3.4

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
CRM	Delivery	Delivery link added to Home menu.
CRM	Navigation	Bookmarks can now be deleted separately.
Interface	Downloads	Downloaded policies with a status of "New" automatically move existing policies with a TBD or Unassigned status to history.
Interface	Rating	Enhanced FSC 2-way integration allows importing from and exporting to FSC Rater for quotes.
Interface	Rating	Additional Personal LOB's for FSC: fire, motorcycle, mobile home, tenant, condo.

Resolved Issues

- Book of Business Detail - package policies are now broken down by LOB.
- Vendor 1099 Payables - picking up expense entries is now 1099 applicable.
- Nexsure / Outlook synchronization is scheduling accurately.
- Endorsed policies retaining vehicle information.
- Invoice Detail - Receivables and Payables tabs are now when viewing invoice detail on installments.
- Post Invoice – Selecting the ‘No’ option, lets the ‘Post’ link remain active.
- Delivery of Certificates – Certificates now retaining attachments during delivery.
- Deleting the last General Ledger entry no longer deletes all of the journal entries.
- Home / Actions – Actions link is responding properly.
- Entering "All LOB" for agency commissions now shows all LOBs on the Policy Info Screen
- Trial Balance Summary by Account Type – Columns have been added for Beginning Balance and Activity This Month.
- Trial Balance Summary by GL Number - Columns have been added for Beginning Balance and Activity This Month
- Accurate LOB and policy numbers showing on Outlook attachments.
- Adding actions from home menu no longer displays grayed out policy numbers.
- Carrier Payables Reconciliation – ‘Other Activity’ section shows journal entries and AP entries only.
- Clicking on the Certificate tab displays the tab properly.
- New applications can now be added to an Opportunity.
- Servicing – Right clicking to cancel a policy is working properly.
- Servicing - Right clicking to create an audit is working properly.
- Assign credit is no longer active at client level.

- General Ledger - Using the page drop down to select a page is working properly.
- People Payables Due Reconciliation – ‘Other Activity’ section only picks up activity for non-auto entries.
- People Payables Non Due Reconciliation - ‘Other Activity’ section only picks up activity for non-auto entries.
- Accounts Payable – You can now enter references that contain an apostrophe.
- When a compound billing invoice is posted, the transactions created are now grouped properly.
- Reinstated policies are now appearing on the summary of insurance properly.