Nexsure Release Notes

Version 1.3.5

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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 1.3.5, 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.

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 1.3.5

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Interface	**Downloads**	The following carrier/line of business combinations have been added to Nexsure for download capabilities.
		Farmers - Home
		Farmers - Personal Auto
		Liberty RAM - Dwelling Fire
		Liberty RAM – Home
		Liberty RAM - Personal Auto
		Liberty RAM - Inland Marine
		Liberty RAM - Dwelling Fire
		Virginia Mutual - Dwelling
		United Fire and Casualty - commercial General Liability
		United Fire and Casualty - commercial Umbrella
		United Fire and Casualty - commercial Workers Comp
		United Fire and Casualty - commercial Auto
		Hochheim Prairie - Dwelling Fire
		Hochheim Prairie – Personal Auto
		Travelers - Dwelling Fire
		Travelers - Inland Marine
		New Jersey - Home
		New Jersey - Inland Marine
		United Fire and Casualty - Personal Umbrella
		Iowa Mutual - Personal Auto
		Cincinnati Equitable - Home
		Southern RAM - Inland Marine
		Southern RAM - Dwelling Fire
		First Trenton - Home
		Fidelity - Flood (Home)
		Cincinnati Equitable – Personal Auto

Resolved Issues

- Territory level transaction summary tab now displays data after the period has been specified.

- Searching for a GL number during a disbursement returns the exact number.

- Lost Business Report - working properly.

- Accounts Payable is reversing to the proper GL account when processed in a vendor disbursement.

- Policy Info - When editing a "Reinstated" policy, details icon and [Add New] links in policy info tab are now available/active.

- People Payables Due - Reversed invoice is not reflects properly in People Payables and GL.

- Expiration Report – Reports now display properly when filters are applied.

- Invoice Transaction Register - Reconciliation Report – Showing correct commission amount.

- Carrier Payables - when disbursements are issued the report is now showing the balance due when report is run with retroactive dates.

- Sex, DOB, SS# and State License are populating drivers section of Auto apps correctly.

- Reversal invoice is updating amounts in the policy info tab of in force policy properly.

- Using copy on an endorsement now displays a Status of 'A' instead of 'C'

- Aged AR - changed "Date" under sort options to read "Date Booked".

- Aged AR - changed "Assignment" under sort options to "Primary Assignment".

- Only users with proper rights can view producer commissions displayed on the Policy Info tab.

- Bank Account Accounting Transactions report is working properly when selecting search criteria.

- Accounts Payable - payee names are printing on report after Journal Entry is made.

- Changing the "bill to" on an Invoice to Additional Interest works properly.

- Line Item Dist. - Employee LIDs are now displayed on the employee transaction tab.

- Aged AR Summary - report is displaying lines of compound billings correctly.

- Journal Entry - Removing a G/L record line and posting the journal entry works properly.

- Verification on Personal Lines Auto policy is displaying correctly when "Select All" is selected.

- Operating Account totals are displaying correctly on the Territory Summary screen and the GL.

- Reconciliations - Searching / sorting by reconciliation works correctly.

- Client address is now printing on checks correctly.

- Invoice - Add from Client Transaction (when a policy has a single quote in the policy number) works properly.

- General Ledger - The last page arrow >| is advancing the page correctly.

- Multiple clients can endorse with a submitted endorsement on them.

- People Payables - Added sorting by client name.

- People Payables Due Recon - Added sorting by client name.

- People Payables Non Due Recon - Added sorting by client name.

- People Payables - added sorting options for Policy # & Invoice #.

- People Payables Due Recon - added sorting options for Policy # & Invoice #.

- People Payables Non Due Recon - added sorting options for Policy # & Invoice #.

- ACORD 127 - The carrier name is no longer truncated in the form.

- The action note is now attached to the copy of the policy after being sent to history.

- Changed default for "Exclude Credit Balances" to NO.

- Classified tab under client profile: added code class.