Nexsure Release Notes

Version 1.3.6

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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.

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Section 3: What's New in Version 1.3.6

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Reports	**Accounting**	• Carrier Payables Detail - added policy effective date to report • Production Details - added entity name to report header • Production Graph - added entity name to report header • Production Summary - added entity name to report header
CRM	**Navigation**	• The selected menu remains highlighted to facilitate navigation
CRM	**Certificates**	• Copying existing certificate holder copies special instructions as well • Search capability added to certificate holder summary screen • List of certificate holders for the current client now includes the beginning of the special instructions text • Allow export of all certificate holders for the client • Add search/sort/paging controls to the related accounts screen.form generation error handling

Resolved Issues

- Lost Business Report - picking up data correctly.
- Production Reports - Page numbers displaying properly.
- Accounting: Service an edit in force package policy to add a carrier fee to policy info tab causes multiple agy and people commissions to disappear
- Direct Bill Commission Receivable - credits from reconciliations are no longer being assigned more than once where more than one line exists on a package policy.
- Clear search functionality on the deposit screen requires a few seconds to refresh before a search can be done
- opportunity - when adding a contact you click ok, and the pop up refreshes and stays, also the opportunity screen does not refresh to show the added contact
- When using [Add Carrier Statement Transactions] link, selecting one version of a policy then click create invoices keeps ot
- Login time error message shows a format that does not work in the field
- Account Current - on package policies, the package total line is printing as a -0- line item
- Accounts Payable - payee names do not print on report after JE is made
- Additional interest info does not pull from the LOB to the cert
- Reversed invoice shows incorrect amount
- Account Current - LOB's with -0- billed should not print on report
- Org-Accounting-Invoices Tab - there are fields for client name and description but they do not show up on screen. Also, search and sort do not work.
- servicing - renew a professional liability policy the migration pops up but the LOB is not added on the renewed form, only the base requirements show
- Aged AR Details - when grouping by territory AR Residuals are not assigned to the specified territory
- AR Recon - add GL number to balancing totals section
- Carrier Payables Recon - add GL account no. to balancing totals section
- People Payables Recon - add GL account number to balancing totals section
- People Payables Non-Due - add GL acct no. to balancing totals section

- Tax Auth Payables Recon - add GL account balancing totals section
- AR Recon - AR Residuals are printing under amount due and balance due.
- People Payables Due Recon - Other activity section is picking up entries made in disbursements as a Journal Entry.
- Income Statement Month YTD – date is now displaying correctly.
- Phone Finder link is working properly.
- Editing an invoice fee no longer displays as blank when the amount is negative.
- Posting a cancellation for a personal auto policy working correctly.
- Search for Master Invoice ID in Invoice summary View functions properly.
- Census schedule from Base Requirements on a Group Medical LOB delivers correctly.
- Account Current - Compound billing that has been reversed no longer appears on report.
- Amount Paid on reconciliation calculates initial amount correctly.
- Summary Of Insurance no longer shows "unknown" for the Prepared For.
- No longer fax duplicates on summary screen with a status of pending.
- Email Delivery – Now sending all attachments that are associated.
- Client Transaction Summary Filters selections are no longer grayed out.
- Populate button not available on a Commercial Auto Policy claim from history
- Direct Bill Comm Receivable - report is picking up all invoices
- Direct Bill Comm Receivable - report is picking up DB invoices where no policy is associated.
- Closed Claims - Can scroll through the memo field of a closed claim.
- Accounts Payable Details - backdating report AP entries disbursed with the proper date.
- Accounts Payable Details - backdating report shows AP entries disbursed with the proper date.
- Direct Bill Comm Receivable - backdating report shows commissions reconciled with the proper date.
- Disbursements - Auto Accounts Payable disbursements now have the dollar and cents printed on the checks.