Nexsure Release Notes

Version 1.4.0

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.4, 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 1.4

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
CRM	**Actions**	• Actions on the Home screen are now sorted by Due Date first, then by client name.
CRM	**Cancellations**	• Previously cancelled policies can now be displayed on the Home/Cancellations screen. • Agencies can now assign custom reasons for cancellations.
Client	**Delivery**	• Delivery of faxes or email can now be sent to multiple recipients. • If a fax can not be delivered, a pdf file of the fax is automatically generated to be printed and manually faxed. • Enhanced Delivery Summary screen with descriptive status messages and icons. • Address Book with entity lookup feature added.
Policy	**Marketing**	• The Effective Date of a new marketing policy reflects the servicing Effective Date field (when initiated from Servicing screen). • When remarketing a policy, Effective/Expiration dates default to the next policy term. • The Policy Info screen now includes totals of premium, taxes and fees.
Interface	**New Downloads**	• Iowa Mutual – Home • Iowa Mutual – Dwelling Fire • General Casualty – Home • General Casualty – Dwelling Fire • One Beacon – Personal Auto

Resolved Issues

- Org info popup - Department and Unit is populating properly.
- Bill to address is printing on all invoice types.
- Carrier Payables Details - added reversal ID numbers.
- Invoicing - cash basis invoices are following correct transaction paths.
- Invoice Detail - people commission on installment invoices is showing correctly on the screen.
- Compound Billing - The amount owed to people commissions is being set to the premium amount owed.
- Direct Bill Commission Receivable - added column for Commission Type.
- Direct Bill Commission Receivable - added As of Date as date option.
- Direct Bill Commission Receivable - added sorting options to report.
- Disbursement Summary - report balances to the disbursement amount.
- Direct Bill Commission Receivable - Added column header for Invoice Number.
- New Business Report now showing all dept in search criteria.
- Importing a rating info Schedule on Workers Comp policy works correctly.
- Direct Bill Commission Receivables - report is now picking up all open items.
- Direct Bill Commission Receivable - added future balances to report.
- People Payables - added future invoices and future payments to report.
- People Payables Due Recon - added future balances and future payments to report.
- Tax Authority Payables Detail - added future balances to report.
- Tax Authority Payables Summary - added future balances to report.
- Tax Authority Payables Recon - added future balances to report.
- Receive Payments - Receive Payment Details screen displays date booked properly.
- Production Detail - report is limiting data correctly when policy mode selected as criteria.
- Production Details - report is limiting data correctly when bill type is selected (agency bill, direct bill).
- Add Carrier Transaction - Removed details icon for Book of Business invoices to prevent users from applying payments against Book of Business records.

- Production Details - added assignment names under People Commission section.
- Expiration Report - changed default on Include Actions to (N).
- Expiration Report - added ability to limit data by agency or direct bill customers.
- Expiration Report - report now ignores policies that have already been renewed but have not been moved to history.
- Income Statement Details - date range option is working properly.
- Trial Balance Details - changed header to reflect correct date selection (shows As of Date when period selected).
- Trial Balance Summary by Account Type - changed header to reflect correct date selection (shows As of Date when period selected).
- Trial Balance Summary by GL Number - changed header to reflect correct date selection (shows As of Date when period selected).
- Expirations Report: Added sub-types of LOB's so that report can be run personal and commercial lines regardless of the client type selected (commercial lines assigned to personal client type / personal lines assigned to commercial client type).
- Accounts Receivable Recon - report is picking up future balances correctly.
- Posting a Receive Payment Reversal to a Closed/Locked period is working properly.
- Income Statement Month YTD - date range option is working.
- Account Managers are able to add/delete policy info Items.
- Cert holder locations is no longer being displayed "~~NA~~" on the certificate summary screen.
- "Bill Type" option on the Home/Expirations search fields displaying properly.
- Account Balances are calculating correctly after you click "Update" .
- Verification Cards: Generating an ID card on a package policy works correctly.
- Display policies with “future” status on the client card file.
- “Add Record” is available on endorsements with “Submitted”, “2nd Request” and “3rd Request” status
- Aborted audits no longer visible on the home audits screen.
- Renewals are sent to history when new business is processed.
- Active X component are creating an object correctly when selecting policy to apply cancellation download to.
- Client is no longer automatically created without selecting client through client exception screen.