Nexsure Release Notes

Version 1.4.1

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.4.1, 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 1.4.1

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Forms	**ACORD 125**	Policy term for each line is now displayed in chronological order on Prior Carrier summary screen.
Forms	**ACORD 140**	Field size increased for deductible to allow for up to10 million.
Forms	**General**	Ability to copy/paste in text area sections of forms.
Office Integration **Office Integration**	**Bookmarks** **T-Log**	Bookmarks can now be added to attachments and OI items. T-Log records actions on attachments and OI items.
CRM	**Policy**	The calendar icon popup now defaults to the policy effective date.
CRM	**Client**	NexMail renamed to NIC.
Policy	**Annotations**	Annotations have been added to marketing *new* and *existing* policies. Add annotations to policy renewals.
Policy	**Lookups**	Location Lookups added to Garaging Address section of forms.
Setup	**Annotations**	Annotation status defaults can be changed (open/closed, etc.).

Resolved Issues

- Check Printing - MICR Bottom check stock prints the G/L line items properly.
- Trial Balance, Balance Sheet, and Income Statement G/L tabs are displaying correctly.
- Client Mailing Labels - Added grouping options.
- Client Mailing Labels - Added sorting options.
- The system is no longer duplicating the action being added by the CSR.
- People Payables - added policy mode to report as sorting option.
- Carrier Payables Recon - prepayments section is picking up disbursements properly.
- Income Statement Summary - date range option not working, report only returns as of date even when period range selected
- MICR Coding Bottom Check - body of check is blank, no payment details
- Carrier Payables Details - report is limiting data when unit or department entered on Org pop-up correctly.
- Carrier Payables Summary - report is limiting data when unit or department entered on Org pop-up correctly.
- Carrier Payables Recon - report is limiting data when unit or department entered on Org pop-up correctly.
- People Payables - report is limiting data when unit or department entered on Org pop-up correctly.
- People Payables Due Recon - report is limiting data when unit or department entered on Org pop-up correctly.
- People Payables Non-Due Recon - report is limiting data when unit or department entered on Org pop-up correctly.
- Trial Balance Details - changed Current Activity column to reflect absolute values.
- Trial Balance Summ by GL Number - changed Current Activity column to reflect absolute values.
- Trial Balance Summ by Acct Type - changed Current Activity column to reflect absolute values.
- Filtering actions by action topic works properly.
- Production Analysis by Month - report is picking up full date range correctly.
- Production Analysis by Year - report is picking up full date range correctly.

- Direct Bill Commission Receivables - if a payment has been received on a future invoice the payment is reflected as comm received.
- People Payables Due Recon - when report is run by entity, other activity section only picks up entries for that entity.
- Direct Bill Commission Receivable - report picks up payments deducted from disbursements to carriers.
- People Payables Due Recon - report is not picking up invoice cleared by disbursement to client
- People Payables Due Recon - report is not picking up partial payment on a future invoice creating payable due
- People Payables - remove future invoices column from report re: payables are due based on posting rules to future rules do not apply
- Accounts Payable Details - report does returns same data when run by period or as of dates.
- Aged AR Summary - Summary, Details, Accounts Receivable and AR Recon all balance to each other correctly.
- Client Mailing Labels - policy info section working correctly.
- Client Mailing Labels - changed Carrier Information section to include text boxes for Billing & Issuing Carriers.
- Accounts Payable Details - changed date criteria.
- Tax Authority Payable Details - changed date criteria.
- Balance Sheet Details - changed date criteria.
- Income Statement Details - changed date criteria.
- Trial Balance Details - changed date criteria.
- Accounts Receivable Recon - changed date criteria.
- People Payables Due Recon - changed date criteria.
- People Payables Non-Due Recon - change date criteria
- Tax Authority Payable Recon - changed date criteria.
- Changes can now be made to the Policy Info page of a Renewed policy.
- Policy Info security - when the security is set to hide commissions, the Other commission line displays properly.
- Tax Authority Payables Summary - future balances showing in correct column.
- Tax Authority Payables Details - future balances showing in correct column.

- Option button no longer moves from Claims to Cancellation when you click on the LOB selection drop down on the Servicing menu.

- "Year Started" value from named insured screen prefills ACORD 125 correctly.

- Relationships marked as "Both" appear on the related accounts screen correctly.

- Summary of Insurance other coverages from download form shows description on SOI. Properly.

- Print alignment on checks is now aligned properly.