Nexsure Release Notes

Version 1.5.0

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.5.0, including operational requirements, system enhancements, 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 1.5.0

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Forms	**Remarks**	Cut and Paste functionality, as well as word wrapping, is now supported in the Remarks section of forms.
Forms	**Supplements**	A Supplemental Notes option has been added to attach notes without the notes appearing in the memo field.
Policy	**Underwriting**	Added Certificates to the right-click menu on the Print link.
Accounting	**Security**	Added security to block the People payable tab on the invoice if view people commission on invoices is not selected.
Accounting	**Accounts Payable**	Set search criteria for “Auto Process Accounts Payable” to use Date Due = today’s date plus 10 days.
Accounting	**Receive Payment**	Set default to Client when adding new receive payment.

Resolved Issues

- Invoice Transaction Register report: unposted invoices are appearing properly.
- GL Details - transaction ID sorting by number.
- Searching for Direct Bill Statement Policies no longer produces error.
- Journal Entries - report works correctly when date range entered.
- Installments - Down Payment no longer being re-calculated based on rounding rules.
- Account types have been combined and show only one total for the acct type.
- account types have been combined and show only one total for the acct type.
- Client Contact List - birth dates removed from Contact Information criteria.
- Invoice level fee with revenue to carrier no longer generates carrier payables or client AR journal entries for a DB invoice.
- Check Register - Description is now the description from the transaction not account description.
- Populate button is now available on a Commercial Auto Policy claim from history.
- Income Statement Details - hard coded grouping should be by income and expense NOT department.
- Income Statement Summary - hard coded grouping should be by Income and Expense.
- Invoice Type Contemporary - bill to address not printing on personal customers.
- Accounts Payable Details - add future balances and future payments to report.
- Accounts Payable Summary - include future balances and future payments to report.
- Production Details - when grouped by Assignment Last Name the assignment name should appear on the page header.
- Receive Payment reversal to a Closed/Locked period works properly.
- Production Summary - report is limiting data correctly when unit or department entered on Org pop-up.
- People Payables Recon - report is not picking up invoice cleared by disbursement to client
- Accounts Payable Details - disbursements issued against future balances should show as an amount paid and be deducted from AP amount
- Accounts Payable Summary - disbursements issued against future balances should show as an amount paid and be deducted from AP amount
- Disbursement #563 - Transaction paths incorrectly crediting DB Comm Receivable
- Customer Statement - report should show bill to name and address as selected at invoice level and show client name below address
- Empty policy when renewing Professional Liability
- Black Policy Header while selecting policy to endorse
- Cancelled policy from conversion still active -- needs to be cancelled and the cancellation date corrected

- NexMail on Summary of insurance sends link, but clicking on link to use temp login says Timed Out
- Invoice Transaction Register - add output options re: bill type
- Invoice Transaction Register - LOB not reflected on report
- Invoice Transaction Register - unposted invoices should reflect a -0- balance for billed amount, branch and people commission
- Production Details - report working correctly when grouped by LOB
- Production Details - changed column header Description to LOB, show LOB when Show Invoice Breakdown (N) selected
- Production Details - added recap section at end of report for subtotals of bill type, policy mode, lob type
- Production Summary - added recap section at end of report for bill type, policy mode and lob type
- Production Summary - removed Group by reference under first column
- Production Summary - added shading to report re: new sub-grouping option
- Locations now available on 125 during an edit.
- Enhancement - Book of business with retail agent grouping.
- Book of Business Summary - stack premium and commission columns.
- Invoice Transaction Register - Added Client Name to report.
- Invoice Transaction Register - Added billing carrier to report.
- Accounts Payable Details - payments to future invoices should only apply if they are booked within the date range of the report.
- Direct Bill Commission Receivables - when a recon is entered with two lines for one invoice the report it now picks up both lines.
- Can now view pending Audits from the Home Audit Menu when the audited policy is in history.
- Error on Agency Bill invoice selection for Hanover during a reconciliation.
- Clicking on contact email address and sending an email never delivers email. Email sent here should be on delivery page.
- Book of Business Details - report is now picking up policies with -0- agency commission.
- Account Current - added column to report re: payment received by agency
- Book of Business Details - report picks up all active policies with a status of In Force, Bound or Reinstated.
- Filtering for additional interest on cert holder working correctly.
- GL Details - report is now picking up all invoices posted to DB Comm Receivable account.
- Disbursement - Selecting Carrier entity with subordinate carriers works properly.
- Address field is populating correctly with FSC
- Accounting transactions under bank accounts is no longer returning GL number description instead of transaction description.
- Nexsure is no longer replacing apostrophe with percent sign in search filters.