



Nexsure Release Notes

Version 1.6.0

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.6.0, 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.

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 or 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 1.6.0

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Accounting	Invoicing	List Billing - List Bill provides a means of splitting a premium over multiple entities and locations. A list bill is comprised of one master policy billed to multiple locations. The master policy provides insurance coverage for locations insured on a policy.
Forms	ACORD 131	Added location overflow to commercial umbrella.
Forms	ACORD 140	Added functional replacement value as drop down option for valuation.
CRM	Card File	Support for Canadian and Mexican Addresses (province and postal code).
Client	Summary of Insurance	Removed null fields from output.
Client	Policy	Display annualized & billed premiums rather than estimated.
Interface	Downloads	<ul style="list-style-type: none"> • Ohio Casualty - Workers Comp • Ohio Casualty - BOP • Florida Family - Homeowners • Utica First - Homeowners • Select - Dwelling Fire • One Beacon - Homeowner • One Beacon - Inland Marine • One Beacon - Watercraft • Iowa Mutual - Inland Marine • State Auto - Commercial Auto • Proformance - Homeowner • Western United - Personal Auto • Guide One - Homeowners • Donegal - Workers Comp • Donegal - Commercial Auto • Harleysville - Personal Auto • Harleysville - Homeowner • Merchants - Commercial Auto • Central Mutual - Inland Marine • Arbella Mutual - Personal Auto • Select - Homeowner

		<ul style="list-style-type: none">• Select - Inland Marine• Republic - Homeowner• Ohio Casualty - Commercial Auto• Guide One - Homeowner• United Fire and Casualty - Homeowner• Republic - Personal Auto• Southern Michigan - Personal Auto• Oregon Mutual - Homeowner• Oregon Mutual - Personal Auto• Tower Hill - Homeowner• Tower Hill - Dwelling Fire• Mendota - Personal Auto• Pekin - Commercial Auto
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Resolved Issues

- Cash Disbursement Recon - only showing unposted disbursements
- Cash Disbursement Recon - change headers and report title for consistency
- Tax Authority Payables Summary - does not hold As Of Date
- Tax Authority Payables Recon - does not hold As Of Date
- Income Statement Details - Need to add grouping ability by entity level
- Cash Disbursement Recon - no data returned when Date Type "Printed" selected
- Account Current - Invoice replicating
- Create a script to update existing polices to reflect changes made to issuing and billing carrier records
- GL Account Details - sorting by account number shows wrong account name
- Carrier Payables Details - add entity names to report header
- GL Details - add subsorting options within each GL name/number
- GL Details - add sub-grouping option to group within each GL number
- Invoices - billing address should print on invoices, not primary location
- Journal Entries - report fails when date range entered
- Org-Accounting-Invoices Tab - there are fields for client name and description but they do not show up on screen.
- Copied certificate show the original template date, need to reflect today's date
- Direct Bill Commission Receivables - add entity name to report header
- Direct Bill Commission Receivable - show client name and policy number on each line of report re: sorting options
- Cash Disbursement Recon - change text boxes to drop down under disbursement info
- Cash Disbursement Recon - check numbers not printing on report
- Cash Disbursement Recon - do not total check number column
- Cash Disbursement Recon - Remove Branch and Region from sorting options
- Cash Disbursement Recon - Add sorting options
- Cash Disbursement Recon - change column header Date Printed to Check Date
- Direct Bill Commission Receivable - Closed option does not limit data to receivables that have been reconciled
- AR Recon - Other Activity section should pick up all non-auto posting entries made to GL Acct 110000
- When adding a % sign under coverages/Perils/Forms on an accord 27 the % does not save or print

- Disbursement Batch Printing - there is no scroll bar on the check number pop-up, screen gets cut off if more than 10 checks are printed at once
- Accounts Payable Details - add future balances and future payments to report
- Accounts Payable Summary - include future balances and future payments to report
- Carrier Payables Summary - add future balances to report
- Carrier Payables Details - add future balances to report
- Carrier Payables Recon - add future balances to report
- Tax Authority Payables Details - Add entity name to report header
- Tax Authority Payables Summary - Add entity name to report header
- People Payables Due - cash receipts posted twice to GL Acct 201000
- Need clients merged
- Client Listing report showing clients, prospects and suspects, but only clients was chosen to be shown on report
- Direct Bill Commission Receivable - future invoices do not show a client or policy number
- Client List report in XLS format does not show birthdate
- Deposits when entering a deposit the cash receipts that appear do not match the total for GL Acct Undeposited Funds
- Client Listing - filters for assignment are not working
- Receive Payment #796 - Unable to reverse because link is grayed out
- 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
- Production Analysis by Month - should balance to Production Details when details is grouped by assignment last name
- Invoices for client are not available at the Receive Payment screen
- MICR Bottom - The MICR bottom check does not display all the information.
- Aged AR Details - Org name not printing in report header (region and territory ok)
- Aged AR Details - aging should default to 30, 60, 90 days
- Direct Bill Comm Receivable - future balances that have been prepaid should not show an negative bal due unless recon date is within the date range of report
- Tax Authority Payables Recon - add entity name to report header
- Tax Authority Payables Details - add Grand Total line at end of report
- Lost Business Report - duplicating lines based on multiple assignments to a policy
- Production Analysis by Month - add grouping options, remove hard-coded grouping by assignment
- Production Analysis by Year - Add grouping options to criteria, remove hard-coded grouping by assignment

- Address Line 2 not pulling over onto invoice header or printed invoice
- Canceled policies are being displayed as Pending Cancellation on the home/cancellation menu
- Production Details - change column header Description to LOB, show LOB when Show Invoice Breakdown (N) selected
- Production Summary - add Group By [2] on report criteria page for sub-grouping option
- Accounts Payable Details - payments to future invoices should only apply if they are booked within the date range of the report
- Disbursement - Check Type 10180, line 2 from address should print on checks
- Disbursements - Check Type 80971, address line 2 not printing on checks
- Disbursements - MICR Coding Top Check, address line 2 is not printing
- Disbursements - MICR Coding Bottom Check - address line 2 not printing
- Disbursements - address line 2 not printing on checks
- Auto ID cards are not marking the PIP of BI sections
- InvoiceBill Type does not match Policy Stage
- Client Receive Payment - the GL link on client receive payment disappears after posting
- Programming text displaying for location address on client location summary page
- Actions added to a client for a claim, but there is no claim
- Tax Authority Payables Details - totals in amount paid column are incorrect
- Tax Authority Payables Summary - totals in amount paid column are incorrect
- Forms are printing out of order
- Disbursement - The 'Check #' field allows the entry of '+' and '-'. This field should be numerical only.
- Reconciliation - When reversing a reconciliation created in a month now locked/closed, the original recon date booked is changed to the reversing recon date booked
- Journal Entry - Getting a NexsureX error message when attempting to go back to the summary screen from a journal entry
- Need to reinstate policy but do not have the option to do so.
- Disbursement posted 3 times with the same check number without reversing
- 1 LOB shows as a package
- Producer sections of Work Comp policy application and binder are displaying error messages: Error occurred:XDW.Wizar
- Save action on General Ledger Link of Disbursements does not function properly
- LOB stripped from Policy
- Error renewing using the context tool
- We have two auto renewals in the policy summary screen - but the most recent app with up to date coverages is in history
- Delliveries - If you keep clicking send it will keep adding emails or faxes to the que
- Journal Entries - report should not show entries with -0- debits, credits

- Journal Entries - report is not picking up all entries within date range
- Production Summary - when report is grouped by People Last Name the report total is incorrect
- GL Details Report not in balance w/Balance Sheet Report
- GL Account Details - runs very slow on Org38, check report artifacts
- Printing Eqt floater Accord 146 shows wrong item number for schedule equipment even though details in app tree shows ??
- Remove clients
- Policies need to be reinstated from history
- Umbrella policy is printing 402 pages
- Unable to delete non issued certificate
- The journal entry does not display the Journal ID correctly for a reversed journal.
- Cannot enter a negative deposit
- Direct Bill Commission Receivable - accounting change made invoice amounts -0-
- Need to re-instate a policy
- Production Details - grouping by Dept not working
- Production Analysis by Month - grouping by dept not working
- Production Analysis by Year - grouping by department not working
- Production Analysis by Month - grouping by unit not working
- Production Analysis by Year - grouping by unit not working
- Cannot add opportunity template for a branch, the drop-down selection is blank
- Opportunities – Commission doesn't save
- Downloaded policy that was sent to history reinstated
- Unable to view actions that have been created
- People Commission defaults are not pulling through to Policies already created
- People Commission Payable Due Recon - other activity section showing auto posted entries
- Need to be able to select multiple additional interest types on a certificate
- Check printing - Disb. ID 1259 is not printing the alphanumeric amount on the check.
- Accounting Transaction Summary - Selecting the previous year results in a NexsureX error.
- Servicing>Migrate>Vehicle Info disappeared
- Prior Carrier data in Acord 125 for Umbrella LOB in marketing does not print when ALL apps are printed. Prints fine when only Acord 125 is printed.
- Servicing descriptions are not staying with the policy
- Error trying to reverse invoice
- Income Statement Month YTD - report failing
- Income Statement Details - remove grand total line from each page footer
- People Payables Non-Due Recon - sorting options blank on criteria page

- Changing the "Bill to" at the invoice level does not show on the printed invoice
- Ref B#6187 New case of Data in Payment Advance pop-up is not saving to main Disbursement screen consistently.
- Newly added code description is not available for selection on the Client's classified tab
- Departments with multiple units have the same Unit Number
- Account Current - invoices should be grouped together regardless of sorting option
- Specific disbursement workflow involving payment advance is causing system to post an additional zero disbursement rec
- Journal Entry - Clicking 'Abort' link in the details screen does not close out the window and return the user to the summary
- New Payment Advance pop-up defaults to cancel button - change to default to OK button
- Additional interest zip code is not displaying on search screen if viewed immediately after adding the new AI
- Nexsure X error clicking on the details of a binder, or creating one
- Selecting Detail Assigned view on transaction summary screen returns error
- Policy Info - Endorsement & Edit not consistently returning annualized & billed information
- Policy Info - Edit commission populates in pop-up, but doesn't save to policy info screen
- Criteria pages - NexsureX error occurring on criteria pages that use date type variable
- Clicking on Vendor tab at Territory level causes NexsureX Application Error
- NexsureX error when I click on the Vendor tab at the territory level
- GL Account Details - not limiting data to one GL number
- There are two primary locations/named insureds/etc.
- When clicking on the details of a policy in history it gets an error
- Posting a submitted endorsement after starting up a pending cancellation on top of the submitted endorsement causes cancellation options to go to history
- Calendar defaults to 1900 (Marketing)
- Policies need to be reinstated from history
- client request - delete a bad client file
- Account Current - reversal compound billings not reflected properly on report
- Invoice not pulling the address - I don't appear to be getting the address on the invoice. Can you help
- Production Details - payment advance invoices should be excluded from the report
- Date Booked filter does not appear to be working on Bank Accounting Transactions
- In QA 56 changing to Bill To During Invoicing, where there are 200+ entries for additional interest, when you select one and cli
- Extra submitted LOB appears when doing an endorsement
- Accounts Receivable - duplicating lines for AR Residual balances
- Need policy reinstated

- Invoice Transaction Register - invoiced amount is doubling on list bill invoices
- Related accounts - next arrows are grayed out. Drop-down box always says page 1.
- Remove actions
- Need policies reinstated from history
- Changing the Bill to Address on a client invoice and the address is OK, but a different client name is shown
- Date period - criteria page is not showing 13th period on period range drop-down
- (part B): When exporting from certificates summary screen there is a 100 character limit
- Aged Accounts Receivable Details - add grouping/sorting options and people information
- Black bar menu disappears upon moving a marketing record to history using context tools
- Payment summary screen displays incorrect results for client PM Productions
- Production Details - filtering by bill method not returning correct data
- XDW.Wizard error in producer section of Worker's Comp FL
- All check types are showing zero dollars and 0/100 cents in the check
- LONG-TERM TRACKING: Invoice cannot post due to "date booked is missing or invalid" error
- Duplicate policies on submitted endorsement
- Reinstatement needs to make active
- Journal Entry - clicking on the details icon of a reversed JE displays JE #1 (Opening Retained Earnings Balance shipped w)
- Disbursement - Clicking on Invoice link of Carrier type disbursement, not all invoices display until pay all selected is clicked or clear/search
- Disbursement - Reversing disbursement fails due to post error
- Disbursement - Reversal error creates duplicate of disbursement being reversed instead of offsetting entry
- Receive Payment - Reversing a prior period receive payment that was included in a deposit errors out because Deposit must be reversed in order to reverse the cash receipt
- Reconciliation - Add Carrier Statement Transactions not creating invoices ** Duplicated in PP0**
- Reconciliation - clicking on Invoice Link of Carrier type reconciliation , not all invoice display until pay all selected is clicked
- Policy was sent to History during an endorsement. Need to re-instate
- List Bill - Create invoice screen is blank when trying to create invoices for a List Bill policy.
- error when trying to reverse invoice in a locked period
- Downloaded policies went to wrong client
- Check Type 80180 - memo line printing through account number on pre-printed checks
- Actions - Same policy number showing for almost every client on actions summary screen
- Duplicate policy created after renewal
- checks print out of alignment - Check style 80180

- People Payables Due - Invoice is displayed 3 separate times on the Producer Payable report
- Duplicate policy created after renewal
- Certificate overflow is not being created
- Invoice dates are mis-aligned and will not allow the invoice to be posted
- Invoice - new invoice created for existing policy displays 2 lines for Premium - deleting 1 line deletes both
- Account Current - report is returning data for territories other than the one selected on the org info pop-up
- Aged Accounts Receivable Summary - report failing on PP0
- Cannot edit downpayment amount in invoice header of an installment once initial entry is saved but before creating invoices
- Cannot create invoices for a master invoice for installment invoicing
- Balance Sheet - not showing correct As Of date in header
- Can not change down payment amt or date in Master Invoice edit header field
- Disbursement - Reversing a disbursement created in a closed/locked month is causing the original entry's date booked to be changed to the date of the reversing entry
- Deposit - Reversing a deposit created in a closed/locked month is causing the original entry's date booked to be changed to the date of the reversing entry
- Master Invoice - Creating invoices results in an error.
- Master Invoice - Clicking on the master invoice number results in an error
- Nexsure X error on Client/Binder page
- List Bill: Unable to see the installment invoices as they are completed.
- Disbursement - Header is blank for disbursements created in QA Org53 or PP0 Org9
- Financial Entity - Locations Tab - Error "Page cannot be Found"
- Carrier Name Detail Page - "Page cannot be displayed" occurs
- List Bill: Encountered Timeout error with List Bill Detail process
- Context menu correction (remove "check out" option)
- Context menu corrections
- Change "nexMail" to "NIC"
- Word wrapping error on forms wizard
- Client Location Assignment changed to be an outer join