Nexsure Release Notes

Version 1.7.0

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Confidential Information Notice

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.7.0, 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 1.7.0

Nexsure Enhancements

Category	Sub-Topic	Enhancement Description
Policy	Auto ID Cards	• Allow users to enter data in form. • Allow selection of named insured for auto ID cards • Allow batch printing of auto ID cards • Verification tab at policy summary to save copies of auto ID cards
	Certificates	• Add "Delete All" capability to cert holders screen • Ability to tie issue date of a certificate to the specific holder.
Reports		• Batch print capability has been added to the report engine.

Resolved Issues

- "Error in CreatePDFOutput(). OrgID: ## Message: Subscript out of range"

- Policy Info tab and policy summary are displaying wrong annualized premium/fee/tax amounts

- Out of Balance Error when trying to post reconciliation

- Changing Bill To for Finance Company does not pull over name onto header or printed invoice

- People Commission defaults are not pulling over any decimal point/percentages to the invoice ** Duplicated in QA 56**

- Problem posting reconciliation

- Recon fails - Debits and Credits are out of balance after agency commission is decreased through recon adjustment

- Recon/Direct Bill Statement - Nexsure errors out at 200 records when searching for Direct Bill Statement Policies.

- Recon post fails: get debits and credits are out of balance after agency commission is changed through recon adjustment

- Data does not print on Binder application

- ACORD 28 Certificate Holder description of Operations cuts out the middle section

- Unable to select policy for service

- When you choose to renew a package, the "other" commissions double up.

- Cannot endorse a submitted endorsement, it is locked plus carrier section is blacked out on the selection menu

- Policy with "received" status from a download does not show up on a renewal selection screen.

- Expiration report returns 1 page

- New Jersey Insurance Identification Card > Prints policy # only on first card when there are multiple cars

- Cannot edit and update primary locations mailing address

- addresses for each and every finance company appear in the location window

- Salutations not saving for an employee

- Cannot add periods (fiscal year) in PP0 and Production

- Error posting reconciliation

- Need to be able to find installments that were auto-posted

- checks print out of alignment - Check style 80180

- Producer's commission is defaulting into Policy Info tab twice for each LOB

- Problem with the multiple states not issuing on ID cards

- Invoices omitting Credit amounts

- Invoice Search - The "Clear" button is not clearing out the data fields.

- Invoice search - clear button not working, does not clear date info

- Invoice Reversal Fails - Attempting to reverse a posted invoice creates an error

- Invalid Column Name for Sort Field 1 - Updated By in Servicing (Marketing existing LOB)

- Invalid Characters in Gross Receipts field for Clients

- Installment Summary - The Post Invoices and Reverse Invoices link are hidden when not available. -More

- Infinite Loop problem due to Save Filter Settings option when selected in Servicing - Marketing

- home cancellation - when you change the search filter to clear all, search, it says 1 - 26 but when you click to page 26 it says

- Fields are off on the location screen.

- Expiration Report - add group totals to report

- Excel Import - Every Excel import is a department exception

- Error message when trying to print Remarks Overflow Form

- Error clicking ellipsis button next to NAIC code field when adding a new record to Carrier Names tab

- Email2 value not populated in the Email field for new Employee when Email1 is left blank

- Delivery History address book is displaying unsuccessful delivery which should not be included in the results

- Delivery entities locations address book are not displaying the results correctly

- Claims Screen - Client Level - Returning JavaScript Error

- Claims -> Attachments - .NET Error Occurs

- Claims - Can't "Post Claims" Due to an Unexpected LOB Validation Check

- Cannot report on Service Center policies

- Can not deliver attachment type msg (outlook message)

- Branch not created when Contact fields are populated with less than 10 digits for XDTI--QA org 9 3 2003 (Production 56 environment)

- Reports Verified - Carrier Payables & Expiration Reports