



## Newsletter

January 21, 2011

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Be a Fan of Xanatek

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### Tip of the Week!

#### Contact Management Options

Did you know that you have three special features available for managing contacts in IMS? You can make a contact become a primary record. Update ALL contacts on a file to a new address added to the primary tab or switch a contact name with a primary to make the contact available as the primary name in the search list.

#### How To:

- Open Client or Prospect File
- Move to Contacts Tab
- Select Edit from the file menu (located top left above the Add Button)
- Make your contact selection

#### Options:

- Move Contact to Primary will move the selected contact record and move them out to be a primary record. Try this for separations or spin offs.
- Switch Contact with Primary will swap the selected contact and the primary on the file. Try this if the contact is the person that usually calls your office or if the primary contact has passed away.
- Sync All Contacts with Primary will sync all contacts addresses in the file to match the address on the primary tab. Try this when a family moves by updating the primary address and then syncing all contacts up with that new address.

[View All Tips](#)

Time is running out to receive the one time only \$10 credit when you sign up for automatic debit from your checking account for payment of your monthly fees. If you would like to take advantage of this offer, please sign up before this offer end on January 31,2011.

\*Have something in mind that you would like to be covered as a tip of the week? Respond to this email with your requests and you may see them in a future addition.

#### New IMS Version

If you didn't already know, there is a new version of IMS available. IMS version 368 has been released and includes some great new features. We will be highlighting two of them in this issue to get you started! Not sure if your office has updated yet? Here's an easy way to check.

#### How To Check Version

1. Log into IMS
2. Scroll to the bottom of the IMS 3 Menu
3. Click About
4. Version should read 3.6.8

Not on 368? Just contact Xanatek tech support at (800)820-1665 for update assistance.

#### Xanatek Now LinkedIn



Xanatek has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. Please feel free to join and share the group with everyone you know.

If you have any question or comments please email [Brent@xanatek.com](mailto:Brent@xanatek.com)

#### Be a Fan of Xanatek



Xanatek has a fan site on the popular Facebook.com. Join us today.



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