



## Newsletter

February 18, 2011

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### AutoPay

Please download sign up for and fax back to us with a voided check copy.  
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### Tip of the Week!

#### **Send Instant Messages To Notes**

Do you ever find yourself wanting to turn the instant message you just sent/ received into a note? This can be helpful whether you just want to prove you received/ relayed a message or simply because you don't want to re-type what you just said. Did you know that IMS saves all your instant messages in case you need them for this very reason? Just one click can send any message to become a permanent note in clients file. It's easy! Also try this for documenting inner-office email as well.

#### How To:

1. Open *Email* from the IMS 3 Menu. (This is where the inbox and sentbox for all Instant Messaging and inner-office Email is kept.)
2. Open inbox or sentbox containing message you wish to document.
3. Click to highlight message. (Notice each message is stored separately so you don't have to document anything unrelated.)
4. Click *To Notes* to send that message to become a note in IMS.
5. If your message is not already attached to a file, IMS will ask you what file you'd like to send the message to.

[View All Tips](#)

\*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 Carrier Downloads

**Carrier:** Upland Mutual

**Download Method:** Team Up  
**Downloads Offered:** Property and Casualty

If you would like to add these new downloads, just contact the carrier and ask to be set up to receive the the downloads they offer. If you already have a carrier using their method they can just add to it. If you are not using their method, they will set you up for it.

### Boot Camp!

It's that time again. Time for your chance to spending two days learning everything you ever wanted to know about IMS. Come visit us in South Bend, IN March 24th and 25th, 2011. Whether you just need a refresher course or want to learn how to utilize all the features IMS has to offer to further your business we want to see you here! This is also a great opportunity for your office to learn first hand about all the new features IMS has added.

Our classroom setting provides each recruit with a computer to follow along with instructors as they offer in-depth training on every aspect of IMS. Open discussion is encouraged because we also want you to learn from your peers how they use IMS. Cost includes two full days of training and all of your class materials, not to mention lunch both days, for only \$299 per person.

We hope to see you there!

For more information visit [Boot Camp](#) online.  
To register [click here](#).

### 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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