



## Newsletter

February 25, 2011

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### Tip of the Week!

#### Attach a Record to an Instant Message

Did you know that IMS can help you make it easier to relay your messages? Think about how many times a day you use IMS Instant Messages? How often do you let someone know that they need to return a call or that someone is calling for them. With IMS, when this happens all you have to do is attach the client or prospect record you are referencing to on your Instant Message!

Have you ever noticed that Attach button in your instant messages? This little button can attach any, client, prospect or agency record file to your instant message. It will not only show the message recipient who called for them, but allow them to click on the name and pull up contact information or better yet the entire client or prospect file! Read on to learn how.

#### How To Attach:

1. Open Instant Messages from the IMS 3 Menu.
2. Select the IMS user you'd like to send a message to.
3. Type your message.
4. Click *Attach*.
5. Choose the client, prospect, or agency record from the list and click *OK* to attach.
6. *Send* message.
7. When the message is sent with an attachment, the attachment shows up in blue on the recipients message.

#### How To View Attachment:

1. Click the name of the attached file highlighted in blue for contact information and comments.
2. Click the name highlighted in blue in the contact information window one more time to open the file for viewing.

[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 Boot Camp Dates!

New Boot Camp dates have been selected for May 12th and 13th, 2011. Come visit us in South Bend, IN and spend two days learning everything you ever wanted to know about IMS. 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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