



## Newsletter

July 22, 2011

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Boot Camp!


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### Tip of the Week!

#### Find Expired Policies

Have you ever wondered what a yellow dot next to an IMS policy means? It means that the policy is expired, in other words, the policy is past the expiration date listed in IMS. This is an important part of IMS to keep up to date, especially when you are not receiving updates on the policy from the carrier as a part of a daily download. The thought of managing all of those policies every time they need attention can be overwhelming, but we have an easy solution for you. We have built a search feature into IMS that will find expired polices for you.

We recommend that you run a Find Expired Policy search once a week to keep your records up to date. It is now easier than every to accomplish this task with the addition of a filter that allows you to narrow your search for expired policies based on the assigned agency location and/or producer. There is even a shortcut built in that allows you to go to the client file the policy is contained in or even open the edit policy window right from the list of expired policies for one stop updating!

#### How to Find Expired Policies:

1. Open Clients
2. Go to Search (above the colorful buttons across the top of the screen)
3. Click to select Find expired policies and complete the following
  - a) Choose search end date (Consider choosing the end of the week to catch any manually entered policies that may come up for expiration before the end of the week)

b) Select type of policies you want to search for (downloaded, non-downloaded or All)

c) Narrow your search by selecting a specific Agency Location or Producer if desired

d) Click *View* to view the list of expired (yellow dotted) policies

e) Enter new premium value and date range

f) Click *Apply* to make changes to the policy in IMS

**Hint:** Right Click a selected policy for more options:

Update - Will automatically update policy with updated effective date and the same premium.

Go To Index - Jumps to client file where the policy is located.

Edit - Opens the selected policies Edit Policy Window for additional changes that may need to be made, such as making the policy inactive.

**Note:** You can also use the *Export* button to export the expired policy list to Excel.

[View All Tips](#)

### **New Knowledge Base!**

Try out Xanatek's new online help center for help documents and videos. Knowledge Base options can now be found under the Help section of the IMS Menu.

Don't see Knowledge Base options? Contact Xanatek for an Update to our most recent version available, 369.

### **You are invited to Boot Camp!**

Come 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!

**October 13th and 14th, 2011**

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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