



Newsletter

July 29, 2011

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Tip of the Week!

Boot Camp!

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We Need Your Help!

We want to update your agency
information!

Tip of the Week!

Client Clean Up

Keeping your Client files current is easy to do, but also easy to forget about. This tip is a reminder about how important it is to keep your Client files up to date with the correct active status. Read on to learn how to make a habit of keeping an important reporting tool up to date in your IMS Client files!

Active vs Inactive

When you create a Client file in IMS it is defaulted to an active status. The status of the client does not change unless you change it. IMS never assumes that you want the Client to be inactive even if there are no longer any active policies. The Client file remains active unless you change the status to inactive. Why? Because a clients current policies may be cancelled, but you are just re-writing business to a new carrier and new policies will be added shortly. If, however, you have cancelled all policies for a customer and you do not intend to sell them anymore remember to make the Client file inactive.

Making the client file inactive moves the Client file to an inactive client list where it is still available, in it's entirety, and can be used for reporting so that you can continue to market to them if you wish. When you make a Client inactive, IMS automatically unlocks the Termination Reason field and marks a Termination Date on the file. Be sure to enter the reason you are making the file inactive so that this important information is available for reporting. You can even access your inactive accounts and make them active again should the customer return to your agency in the future.

How to: Make a Client File Inactive

Xanatek is in the process of updating all our records. We are hoping you will help, by filling out a short web form. Please visit our website and complete this short list questions.

<http://xanatek.com/agency.php>

By completing the form it will help ensure your agency is being sent the newsletter, updates, and more.

Thanks,

Brent Sheppard

1. Go to the Client's Primary Tab
2. Click *Edit*
3. Change Active: Yes to Active: No
4. This will stamp Termination Date as today and cause IMS to jump to the Termination Reason field.
5. Type in the reason they are leaving your agency for future reporting
6. Client file will be moved to the Inactive Client list and the file name will appear with a slash through the file name as a visual aid to represent that they are no longer active when viewing All Accounts.

How to: View Inactive Accounts

1. Open Clients
2. Click the view option located on the file menu, above the buttons
3. Select *Inactive Accounts* to view only inactive account or *All Accounts* to view both Active and Inactive Clients

Note: Reporting on Inactive Clients is easy. In any report you are using simply change the line that reads *Active is set to Yes*, found under the Client heading, to *No*. You can even add another line of criteria to your report to narrow your search criteria by Termination Date and/or Termination Reason.

Hint: Try exporting data from your report into Excel and choosing *term_date* and/or *term_reason* to display when and why those clients were made inactive.

[View All Tips](#)

Transformation Station

Transformation Station is now available for Real Time Inquiries through IMS. For more information about Inquiries currently available [click here](#).

To request that your office be set up for Transformation Station [submit request](#).

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

Be a Fan of Xanatek



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



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