



Newsletter

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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!

Mail To Code

Every Client and Prospect has the option of keeping track of a *Mail To* code. Simply choose your answer Yes or No and it provides reporting options for exactly what it sounds like it should. Are you going to send Mail To this person or not? When you enter a new Client or Prospect into IMS, the *Mail To* code is defaulted to yes, but you can change the code to no at any time. Keep this code on every Client and Prospect and you can use it as an additional piece of criteria when running reports to include or dis-included them according to your needs. Below are two suggestions of how you can put the *Mail To* code to work for your agency!

Idea One: Use the *Mail To* code to determine whether or not you wish to send marketing mail to this person.

- a) If you know that you would not be able to offer them any other products or services you may choose to answer No.
- b) If a customer requests that you not send them any marketing mail you could honor their request by answering No.
- c) This is also a great option for commercial customers that have more than one location and only wish to receive mail at one of them.
Answer Mail To: No to all locations except primary.

Idea Two: Use the Mail to code to determine if this person would like to receive paper mail or E-mail.

- a) Mail To: Yes = Paper Mail
- b) Mail To: No = E-mail

Hint: Choose only one interpretation of the *Mail To* code and make sure everyone using IMS in your office knows the new procedure for your

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

Mail To code for best results. Can't decide? Use Idea One and create a status code of E-Mail, using it to indicate the customers that want to receive E-mail communication. Both the E-mail status code and the Mail To code can be added on a report to gain your desired results.

[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 Tech Support at (800)820-1665 [📞](#) 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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