



Newsletter

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AutoPay

Please download sign up for
 and fax back to us with a
 voided check copy.

[Sign Up Form](#)

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We Need Your Help!

Dear Brent,

You may have noticed a new voice here at Xanatek tech support. We would like to officially welcome Dawn Hicks to our team! She has made a great addition to our support staff. Be sure to say "Hi!", the next time you have the pleasure of speaking with her.

Sincerely,
 Xanatek Staff

Tip of the Week!

Create IMS Form Letter Template

Have you ever thought about how much money you could save if you didn't have to have letterhead printed? IMS has the answer. If you have Microsoft Word installed on your computer, you can use IMS to create form letters and save them in as templates that can be used to mail letters to individual customers or a group of customer. If your agency is not using the IMS Letter Merge function, you are missing out. Read on to learn how to create a form letter template in IMS that can be used as electronic letterhead for any new letter you wish to create in IMS!

How To Create Default Letterhead:

Hint: You will want your logo available as clip art.

1. Open a Client or Prospect File
2. Click *Letter*
3. Select *Default.doc*
4. Click *Open Letter*

We want to update your agency information!

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


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.

The Default letter will open in Microsoft Word with merge fields already in place. From here you can edit the document, just like any other Word document. You can add headers and footers, change font type and size, add your logo as clip art and insert date to automatically update. Once you have your letterhead created, just click save and it will be available for use with any new letters you create in IMS.

How To Create New Letters:

Hint: If you do not already have an default letter created in IMS, you will want to create your agency's default letterhead BEFORE making new letters.

1. Open a Client or Prospect File and move to the tab that contains information you may want to merge onto the letter (Example: If you will want the policy number on the letter, go to the policy tab.)
2. Click *New Letter*
3. Fill out the Letter Information Window

a) Enter your Document's Name (Example: Renewal)

b) Choose the Category of information that will be on your document to remind future users of the letter what tab they should be on before printing the letter. (Example: Info + Policy if your letter is to contain policy information)

c) Enter Document Description of when and how it will be used. (Example: Mail 2 month prior to renewal)

4. Your Agency's default letter will open
5. Type or copy and paste the body of your new letter into the body of the default letter.
6. Use the *Insert Merge Field* button to insert new merge fields. Try using Merge fields in a sentence.
7. When you are finished click save

Note: NEVER save a form letter with customers name in the display. This will cause a single customers information to overwrite the merge field preventing the letter from being able to merge a new customer's information onto the letter the in the future

Hint: Try using letters for a group of customers through IMS Reports.

[View All Tips](#)

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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Try it FREE today.