



Newsletter

September 2, 2011

In This Issue!

Real Time

Boot Camp!


Linkedin

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AutoPay

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and fax back to us with a
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[Sign Up Form](#)

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We Need Your Help!

We want to update your agency
information!

Dear Brent,

Xanatek, Inc. will be closed Monday September 5, 2011 for Labor Day. Tech support will re-open on Tuesday September 6, 2011 at 8:30 Am for normal business hours. We hope you have a great holiday weekend!

Sincerely,
Xanatek Staff

Keeping Policies Current

Last week we left of wondering what happens when a policy renews and it is not being updated by the carrier? With IMS you are covered. IMS has a built in search to *Find Expired Policies*. This option allows you to narrow your search by location, producer and non-downloaded vs downloaded policies. It allow allows you to update any expired policies right from the search!

How to: Find Expired Policies

We recommend that you do this search once a week in order to keep your policy records up to date

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)

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 IMS Knowledge Base!

Try out Xanatek's new online help center where help documents and videos are at your fingertips. Knowledge Base Options can now be found in the Help sections, at the bottom of the IMS 3 Menu. Click Register KB User, if it is your first time visiting. From then on just click Knowledge Base and log right in!

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

Xanatek Now LinkedIn

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.

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 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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