



Newsletter

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In This Issue!

Article Headline

Boot Camp!

Real Time

Tip of the Week!

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We Need Your Help!

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](#).

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

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

Additional Tab

Have you ever wondered what the *Additional* tab in IMS is all about? Is the *Additional* tab at our office empty? This tip is going to explore what the *Additional* tab can do for your agency. If you have been using IMS, you have probably noticed that IMS contains more data entry fields than most of us know what to do with, but have you ever wished there was a place to put a piece of information that there is no field for? Enter the *Additional* tab. This tab is a blank slate left for your agency to define! Every Client and Prospect has this tab and the 12 fields found on it, can be personalized by your office to store information you need. The *Additional* tab fields can also be merged onto an IMS letter. You can even search them to locate a customer based on information you choose to store on this tab. Below are a few examples to get you thinking about how to put this tab to work at your agency.

Look Up Information

Do you have a piece of information you would like to keep that would help you look up a Client or Prospect file? Maybe a key code or an id number of some sort. By labeling a field on the *Additional* tab you create a place to keep that number or code. This allows you to look it up on the clients file and you can also use the Find button to look up the customer by that number or code.

Create a Merge Field

Do you have a Letter you use that has a field you always have to open the letter to type in because there is no merge field for it? If you label one of the fields on the *Additional* tab to hold this information, then you can add that field to your letter. You can add Primary, Contact and *Additional* tab information merge fields onto the same letter.

Customer Service

Does your office like to ask a list of questions to every new Prospect in order to determine all the products or services you can offer them? Do you always get through all of those questions in a single call? Would you like to be able to

remember where you left off the next time that Prospect calls in? Add those questions as fields on the *Additional* tab, answer them as you ask and never miss an opportunity again. Because the *Additional* tab fields are the same for Clients and Prospects these answers will follow the Prospect when you move them to become a client. So, if you are only through 3 of the questions you want to ask before you sell them their first policy you can move them to be a Client and still pick up where you left off. Have your entire office keep an eye on what questions are left and anyone with access to that file can ask questions and enter answers.

How to: Enter Information into an Additional Tab Field

1. Go to the *Additional* tab
2. Click the *Edit* button
3. Enter information into the desired field
4. Click *Ok*

How to: Find information placed on the Additional tab

1. Open Client or Prospect file
2. Go to the *Additional* tab
3. Click the *Find* button
4. Enter information you are searching for into the blank
5. Change Scope to All
6. Click Search

Your results will display, if any, in the search results area at the bottom of the IMS Search window. Right click on a record for the option to go to it. Click *Yes* if you want to filter your IMS index list of names on the left to only display the results returned in your search. Click *No* if you just want to go to the selected records. If you do filter you will eventually want all of your records back. To clear the filter, go to search (above the buttons) click clear find and all of your records will re-appear.

How to: Add an Additional Field onto a Letter

Note: You can only access letter merge options if you have Microsoft Word installed on your computer.

1. Go to the *Additional* tab
2. Click the *Letter* button
3. Click to select the letter you want to add an Additional tab field to
4. Click *Open Letter*
5. Place your cursor on the letter where you want your merge file to be added.
6. Locate the Insert Merge field button at the top of the letter and choose the number corresponding with your Additional field from the drop down list.

Additional Field No = Merge field number

IMS Additional Field 1 = field0

Note: Be careful not to save over any merge fields with actual data. Your letter should have fields that look like this <<field0>>, not the actual information from that field on it when you save the document.

How to: Customize Additional Tab Fields

Note: Adding *Custom Fields* requires *Maintenance* access.

1. Log into *IMS*
2. Open *Maintenance* (located under Tools on the IMS 3 Menu)
3. Go to *Additional*
4. At the top of the screen, you will find *12 Additional Fields*. Simply type the words you would like to define those fields and close out of *Maintenance*
5. The next time you log into *IMS* you will find your chosen custom fields on the *Additional* tab.

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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