



Weekly Newsletter

January 11, 2010

In This Issue!

Moving Day

Safeco and Auto Owners

Tip of the Week!

Referral Program

Linktomyagent

Linkedin

Be a Fan of Xanatek

Contact Information

Xanatek, Inc.
PO Box 160
Granger, IN 46530

www.Xanatek.com
tech@xanatek.com

Tech Support
800.820.1665

Autopay

Pay your monthly maintenance fee with Visa, Mastercard, American Express or Debit cards. If you are interested in automating your monthly payment contact us at tstansbury@xanatek.com and we'll send you the paperwork!

Events

Want to know where Xanatek will be this year?

Click [Events](#)

Moving Day Changed!

We will now be moving to our new office on January 29, 2010. Technical support will closed for relocation to the Chase Tower in downtown South Bend, Indiana and will re-open the following Monday. You may still leave messages for support at (800)820-1665 or email your questions to tech@xanatek.com to be returned on Monday February 1, 2010.

Xanatek is relocating to facilitate our continued growth. The entire office space has been renovated to our specifications in order to provide better service, technical support, and workflow. Highlights of the space include:

- More than double square footage. Larger training area doubling our current onsite training capacity.
- Increased phone capacity.
- Fiber connectivity to the Internet for more stable and faster support.
- Discounts with the hotel located in the building for those attending Boot Camp.
- Great views of South Bend, Notre Dame, and the area.

We will be offering limited support on the 15th due to the disruption of phone service. Phone numbers will remain the same. Mailing address should be changed to 211 W Washington Street, Suite 1900, South Bend, IN 46601 after 1/15/2010.

Please visit our new location anytime after the 15th.

Calling All Safeco and Auto Owners Agencies

We are looking for any client who has either Safeco or Auto Owners (or both) who are willing to help us test out our new Transformation Station technology.

Come and see us or send a referral.

Transformation station will allow you to make "Real Time" inquiries with various carriers. Before we can roll it out, we need the assistance of several clients to get certified with the carriers. If you are interested, please notify us at tech@xanatek.com. Thank you in advance for your help in making this project a reality!

Tip of the Week!

IMS Downloads

Our download program is consistently improving to be as comprehensive as possible and we take pride in the many comments we receive from our customers who inform us that our download program is the easiest they have ever worked with. Whether it be a behind the scenes change that we make to keep your downloads running smoothly as technological times change or an update made on the outside appearance of the program, our goal is to make the process of assigning policies as user friendly as possible. In this week's tip you are going to learn about some behind the scenes measures we are taking to keep your downloads running smoothly as well as some procedural tips for your office that will cut back on daily download assignments.

What we do:

1. IMS Downloads start by transferring downloaded policies and looking for a matching policy number in IMS. The policy number is the only thing we use to update policy information during our Step One: Transfer process.
2. We take protective measures that prevents the AL3 (IMS download) user from moving onto step two if step one hasn't not completed successfully for any reason.
3. Any policies that are not identified in IMS by a matching policy number become a part of Step Two our Assignment process.
4. If a policy has not successfully updated during the step one transfer process a flag is added to the assign screen to alert you that an attempt was made.
5. If personal driver information is downloaded it will be added into IMS on the Veh/ Driver section on the Miscellaneous Tab by checking for SSN and DLN. If no SSN or DLN is included a unique name and dob will be used to try and add the driver automatically.
6. Contacts will no longer be added if the name has already been found as a contact on the file to eliminate duplicate contact entries.
7. We have also added an option for you to "import driver as contact" allowing you may still choose to add a driver as a contact if you see fit.

To ensure you have all the benefits of our AL3 (IMS Download) program your IMS Version should now be 3.6.5, you may check your *About* button, located on the IMS 3 Menu to find your current IMS version number. If you are not on the current version please check with your administrator as they would have recently received an email containing important update information or call (800)820-1665 for assistance.

What you can do:

1. When you write a new policy you can take a moment to add a policy to the clients file. Entering a policy number that matches the downloaded format will make one less step for the person who takes care of your daily download process.
2. You can help ensure that the hand entered policy number matches the downloaded one by omitting dashes, spaces and any digits that changes to reflect the number of year the policy has been enforced.
3. Still need to know the original policy date? Not to worry it will be reportable in IMS and can be located in the "Origin Date" field of any newly downloaded policy.

Click [Here](#) to view all of Xanatek's archived Tips of the Week online.

Referral Program

You can make an extra \$100.00 to \$500.00 just by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases Image Management Solutions. We have recently improved the program to require all referral of prospects to be submitted on our website. This is to promote fairness and ensure you get your much deserved cash! Make special note of rule number 2 below to find out how to submit.

Here are the rules:

1. The lead has to be new to Xanatek. If Xanatek has already spoken to the lead, it does not qualify.
2. You have to submit the prospect on Xanatek.com. Please visit our website and submit the name, address, phone and email.
3. First come first serve. Sometimes we will have more than one person refer the same agent. We will pay the referral fee to the first agent who tells Xanatek about the lead.
4. Paid-in-full. The referral fee will be paid after their bill is paid.

Here are some additional tips:

- Have the lead remind us where they heard about us. In other words, have them tell us that you sent them.
- Feel free to ask us how it's going! If you refer someone, we would be glad to keep you informed about the sales process.
- Xanatek may change this program at anytime. We also reserve the right to distribute the amount.

Thanks and keep referring!

Brent Sheppard

Announcing Linktomyagent

It's almost here! Xanatek will soon be offering Linktomyagent.com. Simple and easy to use web forms that will allow customers or prospects to submit quotes, change requests, certificate requests, or general contact inquiries. Once received by you, they can be directly imported into IMS.

Linktomyagent.com will work two ways. A prospect could go to linktomyagent.com and search for an agent by selecting their state, city, and a list of participating agents will be displayed. The second way is a direct link from your website. For example - You can link to linktomyagent.com/youragencypage. Once at your page, your logo and contact information will be displayed.

The customer or prospect can then request a quote for Auto, Home, Life or Commercial. They may also submit a endorsement, request a certificate, general contact inquiry.

The submission data will be emailed to you and a copy to your client or prospect. Once received by the agency, you will have a way to add the information to an existing client or setup an entirely new prospect.

This is just the beginning, if response is good, we will be adding commercial line quote forms and more. The cost will be \$200 to setup your pages and \$25 a month will be added to your IMS monthly support.

If you're interested, please contact Brent@xanatek.com

Xanatek Now LinkedIn



Xanatek now has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. A few discussions have been started, but we need more.

To find the Xanatek group:

- Click in the search box.
- Type in Xanatek as the search criteria.
- Change the search type to "Search Groups" (Search People is default).
- Click the "Search" button.

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.

 **SafeUnsubscribe®**

This email was sent to jmburkart@xanatek.com by dburkart@xanatek.com.
[Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).

Email Marketing by



Xanatek, Inc | P.O. Box 160 | Granger | IN | 46530