



Weekly Newsletter

February 19, 2010

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Be a Fan of Xanatek

Dear Brent,

Xanatek has moved! All contact information remains the same with the exception of our address. Please update your records with our new physical address below. We will no longer be utilizing the P.O. Box many of you currently have on file.

Contact Information

Xanatek, Inc.
211 W Washington St.
Suite 1900
South Bend, IN 46601

www.Xanatek.com

Tech Support

800.820.1665

tech@xanatek.com

Sales

800.875.6033

sales@xanatek.com

Autopay

Tip of the Week!

Policy Status Codes

Do you love IMS Status Codes? Are you a fan of instantly knowing something about the client the moment you view their file. Are you an even bigger fan of the reporting option that each Status Code offers? Then you may be interested in adding Policy Status Codes to your IMS regimen.

A Policy Status Code can provide the same benefits as the status codes you find on the client primary screen. It can be used to just know something immediately about the policy. They can also be used in a report to locate all policies containing the same status code.

Policy Status Codes open up possibilities of marking policies for your own internal office purposes. Have you ever wanted to mark a policy that would be good to move from one carrier to another upon renewal? What about, marking a policy as an in-house rewrite even though the policy will be considered new business by the change of carrier? If you code the policies you can report on them to make call lists or merge letters to.

Note: Policy Status Codes can only be created by an administrator with Maintenance rights to the Codes Section. If you have an idea of a status code that you would like to begin using see your administrator to discuss adding them for use.

Once a Status Code is added it will be available the next time you log into IMS. This may mean logging in and out in order for any newly added Status Codes to appear.

How To Create a Policy Status Code:

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!

1. Go to *Maintenance*
2. Select Codes
3. Click the radio button to select *Policy Status Code*
4. Use the *Add* button at the top of the screen to add codes as needed

How To Add a Policy Status Code:

1. Move to the policy tab
2. Click to select policy you wish to add a policy status code on
3. *Edit* the policy
4. Select *Status Code* from the status code list

Click [Here](#) to view all of Xanatek's archived Tips of the Week online. If you liked this tip, you may also like our past tip on [Client Status Codes](#).

Boot Camp Dates 2010

You have completed basic training, now "We want you!" to attend Boot Camp. You are invited to spend two full days with the Xanatek Staff in our brand NEW training facility. This intensive training course is designed to help you better utilize all the features IMS has to offer. Multiple Instructors provide in-depth training on all modules of the IMS software. Boot Camp is a classroom setting where each attendee is provided a computer to work along with the instructors. Open discussion is encouraged because we want you to also draw ideas from your peers on how they use IMS.

Class cost is \$299 per person. Dates have changed, in observance of Good Friday April 2, to April 8th and 9th, 2010. Class will be held at our new office, address above. Special Xanatek rates at the Ramada Inn, just \$69 a night.

To learn more about hotels and travel information visit [Boot Camp](#).

To register click [here](#).

See you there!

New Carrier Downloads

Carrier: Erie and Niagara Insurance Association

Download Method: IVANS

Lines of business available for download: Personal Home with Inland Marine, Dwelling Fire, Mobile Home and Landlord.

Click [here](#) to view an archived tip about getting started with new downloads.

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 Insurance 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



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