



## Weekly Newsletter

February 26, 2010

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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](mailto:tstansbury@xanatek.com) and we'll send you the

### Tip of the Week!

#### Custom IMS Reports

Last week you saw how to use pre-built basic IMS Reports. This week we're going to build on that knowledge and learn how to use them to customize your own reports. Custom IMS Reports can be saved so that you can use them again whenever you need them.

Below you will find our example from last week. We're going to build onto the orphan report to locate any client that may have auto and home, but no life.

#### How To:

1. Open "Reports" from the Main Menu of IMS.
2. Look to the right hand side where you will find manila file folder icons.
3. Click the plus sign next to the "Policies" folder to open the list of pre-created report.
4. Double click to select the "Orphan Accounts".

This will open up the orphan report already filled out and created for you with the criteria of active clients that have at least one auto, but doesn't have home! The new information below explains how to customize that report to look for active clients that have at least one auto and home, but doesn't have life.

5. Change the drop down currently reading "doesn't have" to "has at least one"
6. Located the little black plus sign all the way to the right of the "Group" heading. Click on it. This will add another line of criteria to your group.
7. Change the new line currently reading "Active is

paperwork!

### Webinar

March 19, 2010 Xanatek will offer two Webinars at 10 AM and 3 PM EST for approximately one hour each. We will recap recent tips of the week with Q & A welcomed at the end of each Tip!

### User Group

Xanatek is hosting a user group meetings March 25, 2010 at the Hotel Carlisle in Carlisle, PA.

**Time:** 8:30 - 11:30 AM

**Place:** Hotel Carlisle,  
1700 Harrisburg Pike,  
Carlisle, PA 17015

**Cost:** None!

**Who Should Attend:**

Anyone that uses IMS

**RSVP:**

[Brent@xanatek.com](mailto:Brent@xanatek.com)

Please include no. of attendants in your group.

set to Yes" to read " Active Policies doesn't have Life" by changing the drop-down selections.

8. Look to the top of the screen and click "Report"

Note: If you'd like to run this report to look for a different kind of policy they don't have, simply change the word *Life* to whatever you would like.

### How to Save:

1. Look to the top of your reports window and click "Save As..."
2. Fill in the blanks to assign report name, choose what type of report this is and choose the default report layout.

### Hints:

- Your reports will only be as good as the information you keep
- If you check the other reports found in the folders like the *Policies* folder in step 3 you will find other basic pre-built reports to play with
- You can add additional criteria to any report of ours and make it your own
- If you have a report that you plan to use more than once you can save them
- If you do not like the default report layouts you can Export them to excel and select the information you'd like to appear on your report
- Any report you run can be used to print a batch of IMS Letters or Labels

Stay tuned next week for more information about exporting an IMS Report to an Excel Format.

### New Carrier Downloads

**Carrier:** Farmers Mutual Insurance of Nebraska

**Download Method:** IVANS

**Lines of business:** Auto, Home, Property & Umbrella

**Carrier:** Travelers

**Download Method:** Ivans

**Lines of business:** Boat

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

## 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!

## 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](mailto: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](mailto: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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