



Weekly Newsletter

February 26, 2010

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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

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!

Tip of the Week!

Exporting IMS Reports

Over the last few weeks you have seen how to use pre-built basic IMS Reports and how to customize them to meet your agencies needs. This week you're going to learn how to customize them even further by exporting the data. When data is exported you can choose the information you want to show on your report and how you would like it formatted.

A common report that is best suited for exportation is an email report. From the last few weeks you may have learned how to run a report to locate all clients of a certain type, but what if the information you want from those clients is their email address? Exporting data to Excel will allow you to choose "email" as an option for display on your report.

How To:

1. Open *Reports*
2. Create the report you would like to run.
3. Click the *Export* button instead of *Report*
4. Choose *Excel* as your file format
5. Click Next through the Export Wizard until you come to the *Columns* selection
6. Right click to *Unselect All*
7. Click to check the boxes of the columns you wish to add to your report (Example: first name, last name, company (for commercial file name) and email.)
8. Next through Export Wizard until you get to File Name
9. Here you may name your report and browse to a location to save it
10. Browse to that location and open report

Webinar

March 19, 2010 Xanatek will offer two Webinars.

One at 10 AM and another at 3 PM EST for approximately one hour each. We will recap recent tip series on IMS Reporting Options with Q & A welcomed at the end!

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

Please include no. of attendants in your group.

Hints:

- You can save specifications of an Excel format to prevent yourself from having to choose specifications every time
- Once you export data to Excel it is an Excel document so you can use all the features you may be familiar with in Excel
- If you are looking to do a mass mailing contact your Internet Service Provider (ISP) to see if you have any restrictions on how many emails you can send at one time
- Only an email address should be kept in an email address field in IMS, otherwise you will get whatever information is listed in the email address field listed on your exported report
- IMS Reports can also be done for your Prospects
- Any report you run can be used to print a batch of IMS Letters or Labels

If you are enjoying this series, you may also like our archived Tips of the Week detailing how to use Reports to locate all clients that have an [email address](#) or how to use IMS Reports for [prospect reporting](#).

All archived tips can be viewed by visiting our website, www.Xanatek.com . Select Weekly Newsletters under the Tech Support Heading.

Stay tuned next week for more information about creating labels using IMS Reports.

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 inquires. 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

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Xanatek has a fan site on the popular Facebook.com. Join us today.

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