



Weekly Newsletter

March 19, 2010

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Be a Fan of Xanatek

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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!

Create Letters & Labels Using IMS Reports

Over the last few weeks you have seen how to use pre-built basic IMS Reports. How to customize them to meet your agencies needs and how to Export the data. This week lets talk about using a report to print a batch of letters or labels.

Any IMS Report can be used to create a batch of letters from IMS Letters your office has saved as well as labels from our label templates. This is done by taking the name, address and/or other information stored in IMS from each file returned on the report and inserting the information either into your previously created form letter or a label template. You can also print directly onto a No. 10 envelope if you prefer.

How To:

1. Open *Reports*
2. Create the report you would like to run.
3. Click the *Letters* button instead of *Report*
4. Click to select the letter/ label of your choice
5. Click *Print - One Label/ Letter* will print for every name returned on your report.

If you are interested in viewing the letter before printing click *Open* before printing. This will open the Letter in Word for you to view. Locate the View Merged Data button by hovering your mouse over the buttons across the top of your open Word document. It is usually a button with <<abc>> on it. Be sure to select the *Merge to Printer* button and keep in mind that you may not want to save changes to your letter when closing.

When you want to spot check Labels before printing or if you know that you have to edit Letters per person, it is a good idea to merge the information onto a new document. Locate the *Merge to New Document* button by hovering your mouse over the buttons across the top of your opened Word Document. Once your Labels/ Letters are merged to a new document, you can edit them as individual records and print them all when you are happy with your results.

Hints:

- The information on your report will only be as good as the information you put into IMS
- Consider if the Mail To code should be added as part of your report criteria
- You can return any report distinct in order to only have a name listed multiple times only return once
- IMS Reports can also be done for your Prospects
- Consider using IMS to print your marketing letters
- Any IMS Report 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 create an [IMS Letter](#) 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.

Xanatek User Group Meetings

Xanatek will be hosting several user meetings beginning March 25, 2010.

Who should attend: Anyone that uses IMS! We encourage you to bring as many people from your office as you like. It will be a relaxed business casual atmosphere to listen, learn and provide input.

Why attend:

- Ask Questions
- Get training
- Tips on using IMS
- See latest updates
- Tell us what you like and don't like
- Tell us what we need to change
- Get information on future updates

- Demo the Call Center
- Hear what your peers have to say
- And more

Date: March 25, 2010

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

Time: 8:30am -11:30pm

Cost: None

Date: April 13, 2010

Place: Hotel Roanoke & Conference Center, A Doubletree Hotel, 110 Shenandoah Avenue, Roanoke, VA 24016

Time: 9:00am-12:00pm

Cost: \$29 Per Agency

Date: April 14, 2010

Place: Richmond Country Club, 12950 Patterson Ave, Richmond, VA 23238

Time: 1:00pm - 4:00pm

Cost: \$19 Per Agency

Date: May 5, 2010

Place: Hilton Garden Inn Pittsburgh/ Southpointe, 1000 Cororate Drive, Canonsburg, PA 15317

Time: 9:00am-12:00pm

Cost: \$29 per Agency

Date: May 6, 2010

Place: Erie Insurance Home Office the Davis Room

Time: 9:00am-12:00pm

Cost: None!

Note: You do not have to be an Erie Agent to attend this event.

Please RSVP to Brent Sheppard - Brent@xanatek.com- if you are attending and how many will be with your group.

Boot Camp Dates 2010

You have completed basic training, now "We want you!" to attend Boot Camp. You are invited to spend two fulls 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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