



Weekly Newsletter

April 1, 2010

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800.820.1665

tech@xanatek.com

Sales

800.875.6033

sales@xanatek.com

Webinar

Date: March 23, 2010

Time: 11 AM and 3 PM

RSVP:

Dburkart@xanatek.com

Please Include: Agency Name, Name and Email Address of attendees, time each would like to attend.

All are welcome to join us

Tip of the Week!

Address Sync

Did you know that there is a way to update addresses in IMS based off of a downloaded address change? Well there sure is! It is called the Address Sync and it is available in the AL3 (IMS Download) program. Here's how it works. Every time you receive a download that contains a different address than what you currently have entered into IMS, the AL3 program saves that information in the Address Sync tool for later. Then what you can do is access those address changes to update IMS at your leisure.

How To:

1. Open *AI3 (IMS Downloads)*
2. click *Tools*
3. Select *Address Sync*
4. Locate name of client you want to update address for (Address under Xanatek Logo is what is currently in IMS. Address under ACORD logo is new address downloaded)
5. Click Sync to update downloaded address into IMS

Helpful Hints

- You will have one address deposit in the sync tool for every policy downloaded so you could see the same name several times
- An address may be in the sync tool because of a differentiation of Street vs St. or whether or not the address had the last 4 digits of zip code or not
- If you haven't been using the sync tool you may want to use the ignore all button and start fresh as a new step tomorrow
- You are in full control of your IMS data

as we cover all things Download. We will recap our tip series beginning today on download special features as well as review two other download related tips released earlier this year.

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!

- The address on a download will never automatically overwrite your address entry in IMS so that you never lose a good piece of information replaced with bad
- You can still update address in IMS by editing Primary when you are notified of an address change if you do not wish to use address sync

For more download information, you may also like our archived Tips of the Week for a [Download Overview](#) and our recommended [Downloaded Policy Review](#).

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

New Carrier Downloads

Carrier: Hartford

Download Method: IVANS

Lines of business: Personal Auto, Home, Inland Marine and Commercial Auto, BOP and WC

Carrier: Madison Mutual

Download Method: Ivans

Lines of business: Personal Auto, Dwelling Fire, Home, Inland Marine and Umbrella

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

Calling All First Chicago Agents

If you are interested in receiving downloads from First Chicago, please contact them so that they could consider adding downloads for IMS Users. First Chicago does not currently download to IMS Users, but an IMS User was recently provided with contact information for any agency interested in downloads from this carrier to call.

Contact: Susan Springer (800) 388-9001 Ext: 2418

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: 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.

Date: May 13, 2010

Place: Xanatek Corporate Office, 211 W. Washington, Suite 1900, South Bend, IN 46601

Time: 9:00am - 12:00pm

Cost: None!

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 will be held at our new office April 8th and 9th, 2010, address above.

Thursday April 8th - 9:00am to 5:00pm

Friday April 9th - 9:00am to 4:00pm

Class cost is \$299 per person.

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!

Linktomyagent

It's here! Xanatek is now 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 works in 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 an 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

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

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.

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