



Weekly Newsletter

April 30, 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

Tip of the Week!

Find Expired Policies

Through our last tip series you learned about options available for downloaded policies. Now lets talk about the policies that do not download. These policies not only need to be entered by hand, but they also need to be updated at the end of each policy term. Having to remember when to update each manually entered policy can be an overwhelming thought. In this tip you will learn that IMS offers a built in search to *Find Expired Policies*. This search will automatically locate any policies that have "expired", meaning that their expiration date has passed and they have not been updated with new information. This feature also gives you the option to update the policy from right within the search. We recommend that you complete this search once a week to keep your manually policies as up to date as your downloaded ones. The more accurate your policies are in IMS, the better your IMS policy reports will be.

How To:

1. Open *Clients*
2. Go to *Search* (above the colorful buttons across the top of the screen)
3. Click to select *Find Expired Policies* and complete the following
 - a. Choose search end date
 - b. Select type of policies you want to search for (downloaded or non-downloaded)
 - c. Click View
 - d. The list of expired (yellow dotted) policies will populate
 - e. Enter new premium value, if changed, and update effective date range and transaction type
 - f. Click *Apply* to update policy from right within the Find Expired Policy search window

and we'll send you the paperwork!

Webinar

Date: May 28, 2010
Times: 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 as we cover how to manage manually entered policies.

4. (Optional) As a final option you can also export to Excel as needed for anything you may need to get more information on later. Example: If you need to visit an individual policy for editing, such as canceling or changing a producer's name you may want to export your remaining list in order to visit policies individually.

Helpful Hints

- Expired policies are represented by yellow dots in IMS
- Use this search for downloaded policies as a way to catch any downloads that a carrier may have failed to send to you
- If a policy needs to be cancelled this must be done by editing the policy individually
- Non-Downloaded policies should be added to the policy tab of the clients file in order to be used for reporting purposes
- Carriers may be able to provide you with a list of non-downloaded policies so you can enter them into IMS, if you have not already done so

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

Real Time Inquiries through IMS

Real Time inquiries are coming to IMS! Transformation Station is in the final stages of beta testing. If you are interesting in signing up for Transformation Station and Real Time Inquiries, then now is the time. What we will need you to do is e-mail tech@xanatek.com with your Agency's name, how many workstations you would like it set up on, and what carriers you are using. When we have this information, we will get in touch with you to schedule a time to set this up for your office.

(Please note: Erie does not work with Transformation Station.)

Boot Camp 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.

NEW Boot Camp Dates 2010

July 15 & 16

September 16 & 17

Day One - 9:00am to 5:00pm

Day Two - 9:00am to 4:00pm

Class cost: \$299 per person

Cost includes two days on instruction, lunch both days and class material.

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!

Xanatek User Group Meetings

Xanatek will be hosting several user meetings this year.

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: May 5, 2010

Place: Hilton Garden Inn Pittsburgh/ Southpointe, 1000 Corporate 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!

Date: May 20, 2010

Place: Hilton Garden Inn Washington/Greenbelt, 7810 Walker Drive Greenbelt, Maryland

Time: 9:30am - 12:30pm

Cost: None!

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

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 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

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

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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