



## Weekly Newsletter

April 9, 2010

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### Contact Information

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### Tech Support

800.820.1665

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

### Sales

800.875.6033

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

### Tip of the Week!

#### Policy Move

Have you ever assigned a downloaded policy to the wrong client's file? Did you know that you can move it to the correct one? A policy can be moved from one file to another through a tool in the IMS Download (AL3) program.

#### How To:

1. Open *AI3 (IMS Downloads)*
2. click *Tools*
3. Select *Policy Move*
4. Step One: Choose client where policy was placed by mistake
5. Step Two: Click to select policy that you wish to move
6. Step Three: Choose client that policy should be moved to
7. Click *Move*

#### Helpful Hint

- To move more than one policy at a time hold down Ctrl and click to select multiple policies

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](http://www.Xanatek.com) . Select Weekly Newsletters under the Tech Support Heading.

#### Webinar

**Date:** March 23, 2010

**Time:** 11 AM and 3 PM

**RSVP:** [Dburkart@xanatek.com](mailto: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 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.

### 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:** 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](mailto: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](mailto: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](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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