Weekly Newsletter

May 21, 2010

In This Issue!

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

Tip of the Week!

ACORD Templates

When a policy is manually entered there is less information to pre-fill onto an ACORD form. Think about a Commercial Certificate (25). Are you tired of filling similar limits in repeatedly on new certificates? Did you know that you can create a template to save time? Follow along with this tip to learn how you can create and save your own ACORD templates.

How To Create:

Do you have a generic client file that you use for testing? If so, that is the place to start. If not, you could create a prospect that could be used for the sole purpose of ACORD Templates. Once you have selected your client/prospect file you are ready to create an ACORD template.

1. Open generic client/prospect file
2. Go to their Misc. Tab
3. Select ACORD
4. Click New
5. Open the ACORD form of your choice

After you have opened the ACORD form you want to make a template for, just fill it in with the limits or commonly shared information that you find yourself entering. If you are thinking of ACORD for 25, don't worry about holders or policies, that will be added when you use the template to create a real form.

6. Click Save
7. Name your template (Ex: Limits of____________)
8. Repeat to create more templates as needed

How To Use:

When you are ready to create a form with information you have already entered into your template, open your generic client/prospect file and go to thier Misc.

paperwork!

Webinar

Date: May 28, 2010
Times: 11 AM and 3 PM
Topic: Managing Manually Entered Policies
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 recap tips in the current series running from April 30th - May 21st.

Tab. Select ACORD and you will see all the saved templates you have created. Double click to open template of your choice. Once it is open you will want to assign it to the correct client and add policies and any other needed information to it.

1. Open Template
2. Click *Assign* to re-assign client

Note: If you have created the template in a prospects file, you can change your list of files to Client files by changing the index selection from Prospect to Clients. This button can be found in the top left corner of the *Assign Information* window.

3. Complete form as usual
4. Save as a new form

Note: Be sure to always save a new form when using a template so that you do not over-write your template information.

We hope you have enjoyed our tip series on Managing Manually Entered Policies: Find Expired Policies, What to Scan, What to Enter and ACORD templates. All of the tips in this series will be covered live via webinar on May 28th at 11:00 am and 3:00 pm. Each session will last approximately one hour.

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

Boot Camp 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.

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!

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 interested in signing up for Transformation Station and Real Time Inquiries, then now is the time. If you are interested in adding Real Time to your agency's capability 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. There is NO COST for this new feature! All we need to know is that you want it. Once we have your agency's 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.)

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 inquires.
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

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

Find us on Facebook

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

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