



Weekly Newsletter

May 28, 2010

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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!

Documentation: Taking Notes

One of the primary reasons you use IMS is probably for documentation purposes. Another may be that you want to be more organized. This tip series on documentation will help you with both. Over the next few weeks we will be showing you how to use IMS to be a superb note taker, an excellent organizer and an efficient team member! We will also introduce you to some short cuts, both new and old.

There are several ways that a note can be created in IMS. You can create a note as a copy of an appointment, instant message or inner office email. A note is created in the attached clients's file when you complete a todo. You can create a note when Zan printing an image or by dragging and dropping an outlook email into an IMS note. You can also just click the *Add* button from the notes tab and create a note from scratch. With all of these options you are never too far away from creating your permanent note documentation in IMS.

To Notes: The To Notes button can be found in the scheduler for appointments and the inner office email inbox/ sentbox for both IMs and inner office emails.

Completed: The completed check box can be found in every todo and can be checked off when the item is completed. Once checked the todo information becomes a note in IMS.

Copy to Notes: This check box can be found when Zan Printing an image. Enter a note in the note area found in the Transfer Window and check this box to copy your note to become, not only a note on the image, but also a note to be found in the IMS Notes tab.

Drag Drop: Any Outlook email can be drug out of Outlook and dropped into IMS to populate a note.

paperwork!

Webinar

Date: June 25, 2010
Times: 11 AM and 3 PM
Topic: Documentation
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 on Documentation.

For how to directions [click here](#).

Add/ Edit: IMS Notes become a permanent part of a client record and can be created by clicking the *Add* button on the Notes tab. Using the *Edit* key does not change what is already in the note, it only allows you to add more information in order to keep everything organized by topic. [Click here](#) for complete details on taking IMS Notes.

Stamps: Right Click in the body of an IMS note to find a new Stamp feature. Select stamps to save time when typing common phrases, like "left a message". This feature is new to notes, but can still be found in the body of Todo notes.

Note: The stamp feature is new and available as of our latest update, 3.6.7, released earlier this month. To check your version click the About button at the bottom of your IMS 3 Menu. Contact your system administrator or call tech support 800-820-1665 for update details.

All the tips in this series will be recapped live via webinar on June 25th, 2010. All are welcome to join us for either the 11:00 am or 3:00 pm session. Each will last approximately one hour. Please RSVP to dburkart@xanatek.com.

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

Transformation Station

Real Time inquires through Transformation Station now availbale through IMS with the following carriers:

Grange
Travelers
Integrity
Hartford

Updates and more information can be found on our [website](#)!

Xanatek Online Backup provided by Carbonite

Did you know that Xanatek offers online backup. We have partnered with Carbonite to offer you offsite backup for your management system data. For a one time setup fee we will install the back up system and offer you renewals at our discounted rate.

Set Up Fee \$139
Yearly Renewal \$49.95

What you get:

- Xanatek will install and setup your backup
- Xanatek will verify that your backup is synchronized 30 days after installation
- Unlimited IMS Storage
- Data will be encrypted for safe keeping
- Xanatek will be able to restore files for you
- Another added backup to your existing backup system
- Easy billing

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!

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

Be a Fan of Xanatek



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

✉ SafeUnsubscribe®

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Email Marketing by



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