Weekly Newsletter

June 4, 2010

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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

Got SilverPlume?

Xanatek needs your help! If you use SilverPlume as a comparative rater, we need you to contact Wendy Haney and ask that they work with Xanatek.

Wendy Haney's Contact Information
Phone: 931-363-6557 ext 212
Email: whaney@vertafore.com

SilverPlume has indicated they will not interface with us until the demand is large enough. Therefore, we need you to make the demand high! If you are interested in Xanatek interfacing with Silverplum please make your voice heard so that they will interface with Xanatek!

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.

and we'll send you the
paperwork!

Tip of the Week!

Documentation: Todo Management

In this series we are covering the importance of documentation. Last week we discussed taking IMS Notes. You learned many different ways you can use IMS to make short work of creating them. One of the ways a note can be created is by completing a Todo. Creating, manageing and documenting Todos is what we are going to cover in this tip.

Todos can be created in several IMS locations. Each location provides different benefits. Anyone can create a Todo and anyone can edit a Todo. What does this mean for you? If everyone in your office knows how to manage Todos efficiently then you can work together as a team to complete them. Below you will find all of the locations that you can create Todos and several places in IMS where you can manage your Todos from. Read on to learn how to use each area and document each Todo so that you can get the most out of this useful IMS tool.

Where To Create:

Add Button- A Todo can be created in the *Scheduler* by moving onto the Todo Tab and clicking the Add button. Here, Todos can be created as a reminder that does not necessarily have to do with any one client/ prospect. If you wish to assign a Todo to a client/ prospect click the person icon under the assigned information section and chose customer you'd like to attach.

Todo Button - Creating a Todo from inside a *Client/ Prospect's* file automatically assigns the Todo to that client/ prospect's file.

Misc Tab - A Todo can also be created from any *Client/ Prospect Misc. Tab* with the added benefit of seeing any open Todos as well as any completed for that record in the past.

Copy to Todo - When creating a note on the *IMS Notes Tab* check the *Copy to Todo* box and the note is also copied into a Todo.

Todo Button (Open Image) - When an image is created in IMS it may remind you of something you have Todo later. Click the Todo button from the *open view of an image* to create a Todo based on that Image. Hint: hover your mouse over the buttons at the top of the open image to see which one is the Todo button. It looks just like the button that adds a Todo in the scheduler.

Task of a Campaign - A Campaign is a series of tasks, a.k.a. Todos, created as a group to ensure the same service is provided to everyone. For more information about campaign creation click here.

How To Document:

Description - A short description of what you will find in that Todo is all that should go in this area. Think of it as a subject line. The description will become the note description once the Todo is completed. If there are details you need to make on a

Todo, there is a notes area you can use to be as detailed as you want to be.

Category - Think of this as your Todo topic. It could be the type of policy the Todo is regarding. It could be the type of follow up call you need to make. It can be anything you need it to be because categories can be created by a system administrator to meet your office needs. You can search for Todos as a group through the Scheduler.

Priority - Choose your level of priority, one thru five, with one being the highest. A priority one Todo will appear in red on the Main Menu, Primary Screen and in the Scheduler to draw your attention to it. There is the option to sort by priority in the Scheduler.

Date - Click on the date to reveal a calendar. Chose a date. Date can be as far into the future as needed. On the day chosen it will appear on your main menu. It will remain in your scheduler assigned to that date until then. If a customer is assigned it will also show on their file as well.

Assigned User - The person creating the Todo will always be the person assigned as the default assigned user. You can change assigned user by choosing a different IMS User name from the user list.

Notes and Copy Tab - Use the Notes section to create as much detail as needed on your Todo. Anyone who works on a Todo can make a note in it.
Use the clock button to date and time stamp your note entry. A Todo could have entries from every person in the office and once completed all entries will become a permanent part of the assigned customer record as a note. (Note: If a Todo is completed on a prospects file that file is not permanent until it is moved to become a client.)
You can also copy a Todo to another user in the office. This makes a duplicate of the Todo for the person that was copied. There is the option to manage both Todos together or separately from that point forward.

Stamps -Right click in the notes area of a Todo for stamp options. No Answer, Left Message, Sent Email, can be stamped with your name, date and time, to save time when these common notes need to be made.

How To Manage:

Scheduler - Locate, edit and view all of your own, past or future, not yet completed Todos by moving to the Todo Tab. Use the calendar to view any day you wish. Double click the section heading; Description, Past Due or priority, to order by that section. Click the Find button to located a group of Todos.

Main Menu - When you log into IMS you are greeted with all of your own Todos that are new for the day and includes any that were not completed as of yet. Clock the Todo description to open the Todo from from your main menu. If a customer is assigned you may also click the customer name to be directed to their file. Todos will remain on your main menu until completion to remind you of anything you have not yet completed.

Primary Screen - Looking to the right of the name in any customer file you can see how many Todos there are on that file regardless of who created them originally or what day they are due on. Simply click the number of Todos, to see what they are. (Note: No Todo will be visible if there are no Todos on that client/prospects file.)

This option helps you help each other.

Example: You may have created a Todo that is not due for a few day and I may end up speaking to that customer before the Todo comes due. I can open your Todo, view details, note our discussion for you or possibly even complete it for you!

Misc Tab - From this tab select the Todo option from the drop down menu and it essentially becomes your Todo Tab. The buttons at the top of the screen become Todo buttons. All Todos, open and completed, for that customer regardless of who created them are shown on this tab and can be created or manages as needed.

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.

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

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!

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

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.

Email Marketing by

SafeUnsubscribe®
This email was sent to jmburkart@xanatek.com by dburkart@xanatek.com.
Update Profile/Email Address | Instant removal with SafeUnsubscribe™ | Privacy Policy.

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