



Weekly Newsletter

June 11, 2010

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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!

Webinar

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

and we'll send you the paperwork!

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.

Tip of the Week!

Documentation: Images

You have seen how to take notes and manage your follow ups. Now what about the paperwork? Any paperwork that you are interested in filing as a permanent part of the record that can never be changed or altered when created as an Image. There are two ways that an Image can be created for storage in IMS. It all depends on what type of documentation you need to store. Read on to learn how to store Images in IMS as well as how to file them for easy look up and use them when you need them.

Zanning vs Scanning

If you are looking to store a paper document. You can use the IMS Scan Center to scan and transfer the document as an Image. If you have a document that is already in electronic form, you can use the [Zan Printer](#) to transfer the Image into IMS without wasting time and money printing it onto paper first.

Zan Tricks

- Check the "Copy to Notes" check box on the transfer window to copy Image Note into an IMS Note.
- When you have more than one document that you want to view as a single document, click the "Send to User Batch Folder" button. This will send your documents to Scan Center where you can combine them with other images being held there.
- If your scanner is not ISIS compatible for use with Scan Center, you may find it saves time to scan images in your usual way and choose to Zan print them for transfer into IMS. Example: You need to E-Mail three declarations to a customer that requested copies of all their policies. Export the first two images, E-Mail the third and attach the first two to a single E-Mail.

Note: The Zan Print Driver has been an included part of IMS installations since April 1, 2006. If you became an IMS user before this date, we offer the option to purchase the Zan printer for \$59 per workstation.

How to Name Images

When transferring an Image by either means available be sure to use a systematic naming convention. Name your images in an organized fashion just like an IMS note. Make sure everyone one in your office knows [what to scan](#) and what image group folder each item should belong in. Use Categories to organize images by

topic within each folder. Treat the description line as your subject line, making it perfectly clear what you will find inside the image. Consider saving time and space by not describing your images using things you already know about it based on where you found it. This uniformity will make it even easier to find an Image when you don't know exactly what you are looking for through the IMS [Find Feature](#) as well as make reporting on scanned images much more accurate.

Bad Example: Jane Dough's Auto Application Signed 6/7/2010

Good Example: 6/7/2010

Everything from the first example except the date of the policy inception would be already known to you by (a.) the client file you are in and (b.) the category (Auto) you have labeled the image with as well as (c.) the folder named Application that the image will be zanned or scanned into. There is even a calendar at the end of the description line that can be used to insert dates quickly!

Image Tricks

Once an Image is transferred, it is stored as a .tif or a .jpg. Any Windows operating system can open a .tif, but not everyone has this option selected. Click [here](#) for instructions you can use to help your customers (or yourself) open those .tifs.

Once stored there are a number of things that you can do with your image. Below you will find a few tricks for using your IMS Images. Just open the image you want to work with and all these possibilities will be unlocked. Hover your mouse over the buttons to see what they can do.

- **Image Information:** Click here to find out who scanned this image when and any notes made on the image at time of transfer.
- **Create a Todo:** Creates a Todo that already contains the image information on it, such as category and description, so all you have to do is select a date.
- **Export Image:** Choose to Export the Images you are viewing, selected Images you have checked, or all Images and save them to another location on your workstation or network. This option can be used to attach Images to email for anyone not using Outlook or the IMS Internet Email settings.
- **E-Mail Images as Attachments:** For anyone using Outlook or the IMS Internet Email settings just click here for the option to save Image as an attachment to your E-mail. Also, use Export Image option to save multiple Images to another location prior to using E-mail option for any correspondence you need to send that contains more than one IMS Image.
- **Size Selection:** You can make an image larger than life by changing the fit to width/height options to increase the size of the image by a percent of your choice.
- **Mouse Pointer:** Once the size of image is increased the mouse turns to a hand that can "hold" the Image and move to any corner of it for better viewing. Simply click, hold and move your mouse and the Image will move just as if you were holding it in your hands.
- **Invert Image:** Using the black and white inversion button can make is easier to read hand writing on an image
- **Move:** If you ever find an image that has been transferred to the wrong file. It can be moved. Note: You need Maintenance rights to the "Move" feature in order to move an image. If you do not have this right, your office manager can assist you with this.

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.

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!

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 an 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

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.

✉ **SafeUnsubscribe®**

This email was sent to jmburkart@xanatek.com by dburkart@xanatek.com.
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Email Marketing by



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