



Xanatek Weekly Newsletter

June 12, 2009

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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 dburkart@xanatek.com and we'll send you the paperwork!

Events

Want to know where Xanatek will be this year?

Click [Events](#)

Tip of the Week!

Status Code Ideas

Status Codes can be used for many things. They can be used for reporting or just to instantly know something about a file when you look at it. Status Codes can be viewed on the Primary tab of every Client or Prospects file in parenthesis.

Below are a few status code suggestions to get you started thinking about how you may be able to take advantage of this IMS feature. Keep in mind that the Status Codes are only limited to your imagination they can be for just about anything you can dream up.

Positive

- VIP
- GOLD
- Receives Cards
- Calendars
- Choc (gets chocolate)
- 10k, 20k, etc

Negative

- PP (Poor Pay)
- GR (Do not rewrite or renew)
- DW (Don't write or quote)
- NCK (No checks)
- NP (Non-Pay)
- DNQ (Does not qualify)
- CL1, CL2, CL3, (Claim 1, 2, 3, etc)
- N\$ (Don't accept money)

Leads

- Internet
- Walk-IN
- Carrier
- Phonebook

Come and see us or send
a referral.

See Referral Program details
below.

- Yellow Page Add
- Billboard
- Radio
- TV
- Newspaper
- Referral
- Trade Show Name

Tracking

- HR (High Risk)
- Spanish, Polish, etc.
- C&P (Both Commercial and Personal)
- Months of the Year (Tracking when a prospective clients policy is up for renewal)

Prospect Leads

- Hot
- Warm
- Cold

Note: Status Codes can only be created by an administrator with Maintenance rights to the Codes Section. If you have an idea of a status code that you would like to begin using see your administrator to discuss adding them for use.

Once a Status Code is added it will be available the next time you log into IMS. This may mean logging in and out in order for any newly added Status Codes to appear.

How to:

1. Move to the primary tab of the client/ prospect file that you wish to add a status code to
2. Click Edit
3. Move to the Comments / Hobbies tab
4. Select status code

or simply ADD a new Client or Prospect and include it on the Comments / Hobbies tab of the new file.

Status Code Report:

For directions on creating a Status Code report see our past Tip of the Week from November 7, 2008 on Reporting on our [website](#). This tip can be used to run a status code report. Just select Status Code under the Client reports folder instead of Orphan Reports under the Policy report folder.

All of our newsletters are archived online. [Click the](#)

link below to view past Newsletters.
<http://www.xanatek.com/newsletter.php>

Referral Program

To: All IMS and Image Archiver Users

Re: Referral Fee Program

Make \$100.00 to \$500.00 by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases Image Management System for insurance and for Image Archiver.

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 notify us of the lead.** Please call, fax, or email us with the lead info. We must get name and phone number to contact them.
- 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 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 between multiple lead generators when necessary. Amount of referral fee will be set at time of sale and is based upon purchase price paid by the lead.

Thanks and keep referring!

Brent Sheppard

Zan Printers

The cost of the Zan Printer has more than doubled this year. We will continue to provide zan printers to all new and existing customers, one per each purchased user of IMS. However, due to the increase in price we will no longer be able to provide any additional copies of the Zan free of charge. As of June 1st

2009, if you wish to have the Zan Printer on any additional work stations beyond the purchased number of IMS users we offer you that option at our cost of \$49 per Zan Printer.

Boot Camp

Want to get more out of IMS? Then join us for Boot Camp, August 6th and 7th, 2009!

IMS Boot Camp will inform, educate, and stimulate your office! We limit each class to a maximum of 12 people. In most cases at least 8 agency's will be represented from various states. The classroom environment provides the opportunity to learn from our instructors and your classmates. Each attendee is supplied with a computer so they may work along with the instructor. Ample time is given for questions and open discussions.

Xanatek provides lunch both days and all your classroom material! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

We have fun too! Thursday night you are encouraged to have dinner with the group to further your discussions. After dinner, voluntary attendance to relax and enjoy downtown South Bend at one or more of our establishments!

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