



Weekly Newsletter

June 18, 2010

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Autopay

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Tip of the Week!

Documentation: Attachments

There are a few big differences between an IMS Image and an Attachment. Attachments can be stored in their original file type. Because they are not permanent so you can edit them as needed, keep them on file as long as you find necessary, still having the option to detach if your need for them ever comes to an end. The attachments tab is a great place to store excel spreadsheets, voice recordings or movies.

How To:

1. Go to the *Attachments Tab*. (It will be the last tab in any Client, Prospect or Agency Record)
2. Click the *Add* button at the top of the screen.
3. Name your attachment just as if you were naming a note or image where the category equals the topic and the description would be a subject line.
4. Click *Select File*: to browse to the file you wish to attach.
5. Click *OK* to complete.

Note: If you do not have Attachment rights contact your system administrator for access. An administrator with access to Maintenance can grant access to Attachments, select the types and sizes of files that can be stored, as well as choose who can Add, Edit and Delete them.

Email Drag and Drop with attachments

If you use Outlook for your email, you may be using our drag drop feature. When dragging and dropping an email that contains an attachment it will appear in a footer at the bottom of the note. Before completing the note right click on the image for options to save as

and we'll send you the 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.

an attachment.

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.

Boot Camp 2010

Two opportunities to attend

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!

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 Silverplume 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 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

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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