



Xanatek Weekly Newsletter

June 19, 2009

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

Events

Want to know where Xanatek will be this year?

Click [Events](#)

Come and see us or send

Tip of the Week!

Categories

Categories are used to organize: Notes, Images, Todos and Appointments. The more consistently you use them, the easier it will be to view, search and report. Categories can be built to meet your agency's needs. Below are a few ideas for building your Category list.

Idea List

- Policy Types (All) - Every policy type you write should also be a category
- Audit
- Cancelation
- Claim
- Email
- Fax
- Info
- Letter
- Mail
- Monthly Reporting
- Payment
- Policy Change (PC)
- Quote
- Return Call
- Rewrite
- Sales
- Status

How To:

Note: Only an administrator with access to Codes in Maintenance can update Categories.

1. Open "Maintenance" on the IMS Main Menu
2. Select "Codes" from list on the far left.
3. Click "Category"
4. Click **Add/ Edit/ Delete/ Replace** from the top of the screen depending of what

a referral.

See Referral Program details below.

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. 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](#).

- you wish to accomplish
- **Add** - Allows you to add an entirely New Category to the list
 - *Hint: When adding a new Policy Type (also located in Maintenance under Codes) be sure to check the "Copy to Category" check box.*
 - **Edit** - Allows you to Update / Change the existing category for future use only.
 - *Hint: If you are Editing a Category be sure to Replace it first so that it is updated on anything it is currently attached to.*
 - **Delete** - Allows you to remove the category from the list and prevent it from being used in the future.
 - *Hint: If you are going to Delete a code, it will remain as a code anywhere that it was previously assigned unless you replace it with something else first.*
 - **Replace** - Allows you to replace and existing category with another. *If you are going to edit a category for future use. Replace the old with the new first so that it is corrected on any item that it may be used on currently.
 - *Hint1: Replacing does not add a new Category. If the Category/ Policy Type you are choosing to replace also needs a new code in it's place be sure to add one.*
 - *Hint2: If you are replacing a Policy Type be sure to delete the old policy type from both your category and policy type list. All of our newsletters are archived online.*

The more you use categories the easier it will be to "Find": notes, images, appointments and todos. Also see "Tip of the week" from "October 10, 2008 - IMS Find".

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 game 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

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