



Xanatek Weekly Newsletter

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Contact Information

Xanatek, Inc.
PO Box 160
Granger, IN 46530

www.Xanatek.com
tech@xanatek.com

Tech Support
800.820.1665

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](#)

Tip of the Week!

Searching Scheduler

Find

The "Find" button is located at the top of the scheduler window. It can be used to find a todo or an appointment based on the criteria of your choice. You can search for a todo based on: user, description, start or end date, note, priority, completed status, category and assigned information.

How To:

1. Click "Find"
2. Select search criteria
3. Click "Find" located at the bottom of the find window
4. Double click to open todo or appointment. Right click to Edit, Delete, or Print.

View

You can view other user's schedules based on your individual user rights. It is located above the buttons on the file menu. There is also an option to filter a todo list by: completion, priority, category, date range and assignment.

How To Change View:

1. Click "View" located third from the left on the file menu
2. Select "View Other Users"
3. Front the list that appears select the name of the user who's schedule you would like to view.
4. Click "OK"

Note: You can have more than one scheduler open at once. So if you need to view your own schedule alongside someone else you will be able to cross-

Come and see us or send 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. 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!

reference.

How To Filter Todos:

1. Move to the "Todo" tab
2. Click "View"
3. Scroll mouse over "Todo"
4. Select "Todo Filter"
5. Choose filter criteria
6. Click "OK"
7. The Todo list will filter to only show the list of todos that contain your search criteria

Print

There are several options to print the information you need out of Scheduler. You can select the date range and details you want to appear on your report. There is flexibility to choose the "Output" to send to: Printer, Screen or HTML.

How To:

1. Move to tab you wish to print from: Daily, Weekly, Monthly or Todo
2. Click "Print"
3. Select print criteria
4. Click "Ok"

Note: You can also *Print Appointments*: daily weekly or monthly, from the "File" option above the buttons.

Note(Monthly View): If you have more than three appointments per day, up and down arrows appears at the right of the week(s) containing the three, or more, appointment day (s). You can use the arrows to scroll through multiple appointments. The arrows scroll that week as a whole. Make note that if you scroll through the appointments to see all appointments for any given day you may have to scroll back up to see the appointments of another day. Please keep this in mind when using the monthly view.

Keyboard Shortcuts in Scheduler

- Ctrl+P = Print
- Ctrl+F = Find
- Ctrl+N = Add
- Ctrl+E = Edit
- Ctrl+D = Delete
- Ctrl+G = Goto
- Ctrl+T = Today
- F12 = Exit

You may also be interested in a related tip from our October 10, 2008 Newsletter on using the Find feature in IMS. Check it out to learn how to find a client by policy number and much more.

All of our newsletters are archived online.
Click the link below to view past Newsletters.
<http://www.xanatek.com/newsletter.php>

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

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

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Xanatek, Inc | P.O. Box 160 | Granger | IN | 46530