



## Weekly Newsletter

June 31, 2010

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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 [tstansbury@xanatek.com](mailto:tstansbury@xanatek.com) and we'll send you the

### Tip of the Week!

#### **Misc. Tab: Short Cuts**

This is a little known tab, but it is one of my favorites because it can do so much! If you haven't visited it lately, I invite you to. If you've never used it, let me introduce you. The Misc. Tab in IMS is a shortcut, a catch all, do a little bit of everything tab. On it, you will find a drop down that allows you to turn the Misc. Tab into anything you need it to become.

#### Misc. Tab Options:

- [ACORD](#)
- Agency Bill
- Appointments
- [Prospecting Tools](#) (Click to see tips from April)
- Receipts
- Quotes - For use with Comparative Raters
- [Todo](#)
- Vehicle/ Driver - For use with Comparative Raters and Insurance ID Cards

Select any option from this list and the Misc. tab becomes a tab for the information you selected where you can view, add and edit without leaving the customer's file. Let's say you are working with a customer and you need to write them a receipt. You're probably already in their file, right? Instead of 5 clicks, going to the main menu to open receipts and billing, just to have to search for the client by name again before clicking Add to create a new receipt, I would suggest going to the Misc. Tab, selecting receipts and adding from there. Try it, it's easy!

You can use this tab to confirm upcoming appointments, change an appointment's time or make new ones. You can use the Misc. tab to view all Acord forms saved for a customer. You can create new

paperwork!

#### Webinar

**Date:** July 23, 2010  
**Times:** 11 AM and 3 PM  
**Topic:** Misc. Tab  
**RSVP:**  
[Dburkart@xanatek.com](mailto: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.

forms from here or edit old ones. Just select *ACORD* and use the Add/ Edit buttons. Try it for Prospects too!

Once you use it, I know it will be one of your favorites too. There is even one more way to put it to work for you. To save yourself even more clicks, you can set the Misc. tab to default to your most used option. To do this, simply choose the Misc. Tab option you use the most and click the red thumb tack icon. This will set your selection as the default. This is a personal setting option, so everyone in the office can choose their own default.

All the tips in this series will be recapped live via webinar on July 23, 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](mailto:dburkart@xanatek.com).

All archived tips can be viewed by visiting our website, [www.Xanatek.com](http://www.Xanatek.com). Select Weekly Newsletters under the Tech Support Heading.

#### Boot Camp 2010

There are still seats left for our July Boot Camp session and we want to see you in them! Cost includes two days on in depth IMS instruction, lunch both days and class material. You are invited to join us as we cover all aspects of IMS, including show and tell of our latest addition Transformation Station for real time policy inquiry.

July 15 & 16

Day One - 9:00am to 5:00pm

Day Two - 9:00am to 4:00pm

Class cost: \$299 per person

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!

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](mailto: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](mailto:Brent@xanatek.com)

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Xanatek has a fan site on the popular Facebook.com. Join us today.

Email Marketing by

✉ **SafeUnsubscribe®**

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