



Weekly Newsletter

July 19, 2010

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Tip of the Week!

Misc. Tab: Vehicle/ Driver

Last week you learned about the versatility of the Misc. Tab. One option that tab offers is the Vehicle/Driver Section. Today you will learn about all of the benefits this option has to offer.

First, let me share with you the 3 ways information can be added to the Vehicle/Driver Tab. One way you can receive information in the Vehicle / Driver section of the Misc. Tab is for the information to be downloaded. If a policy is downloaded and it contains Vehicles and/or Drivers they are added to the Vehicle Driver list. The IMS Download Program (AL3) will check for matching vehicles and drivers to update this information or add it as new.

Another way that you can receive information into your Vehicle/ Driver Tab is by way of a Quote. If you are using a comparative rater that bridges by sending information to Xanatek you can receive vehicle and driver information into IMS when you upload a quote. (Examples: EzLynx, ACS2000) The current list of raters bridging with Xanatek is listed below:

EzLynx - Supports Sending information to IMS and receiving information from IMS.

ITC Turborater - Supports receiving information from IMS.

ACS2000 - Supports sending information to IMS.

SEMCAT - Supports receiving information from IMS.

All Other Raters - Xanatek is happy to bridge with any rater. If you are using or are interested in using a rater not on this list, please contact the rater and inform them of your desire to bridge with Xanatek.

If you are a Silverplume user please contact Wendy Haney of Silverplume at whaney@vertafore.com to make her aware of your interest in bridging with Xanatek.

paperwork!

Webinar

Date: July 23, 2010
Times: 11 AM and 3 PM
Topic: Misc. Tab
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.

Corrections

Fall Boot Camp

Last week's email listed incorrect BootCamp dates. Boot Camp is October 21st and 22nd. Not in September as last weeks newsletter stated.

Silverplume

Wendy's email address is:
whaney@vertafore.com

We apologize for any confusion.

You can also enter this information to the Vehicle/Driver Tab yourself. To add new information to the Vehicle/ Driver Tab by hand all you have to do is selected *Vehicle/ Driver* as your Misc. tab option and use the *Add* button. Use this option if you have Vehicles and Drivers that you need to keep track of that do not download from the carrier or as a part of a quote.

Note: Commercial Vehicle/ Driver lists must be created by way of a quote or entry. Downloaded Commercial Vehicle and Drivers are coming as a part of the next IMS update.

Now, about those benefits. What does all of this mean for you? You can go to the Misc. Tab of any client that has Vehicles/ Drivers available on their Misc. Tab to select and view the vehicles and drivers on that client's file. Any client that has vehicles and drivers added can be used to quote through a comparative rater that bridges to receive information from Xanatek. (Examples: ITC, SEMCAT, EzLynx) The Vehicle/ Driver list is also available for pre-fill on the following ACORD forms:

ACORD Location: Other

No. 50 - Insurance ID Card
 No. 127 - Business Auto Section
 No. 129 - Vehicle Schedule

ACORD Location Commercial

No. 163 - Commercial Auto Driver Info.

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.

All archived tips can be viewed by visiting our website, www.Xanatek.com . Select Weekly Newsletters under the Tech Support Heading.

Boot Camp 2010

Did you think that you missed out? Well there is still one more change to attend Boot Camp this year. We have seats available for our Fall 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.

October 21 & 22

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 an 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®**

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Email Marketing by



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