



Weekly Newsletter

August 6, 2010

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Webinar

Date: August 27, 2010

Times: 11 AM and 3 PM

Topic: Manager Help

RSVP:

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Please Include: Agency Name, Name and Email Address of attendees, time each would like to

Tip of the Week!

Inactive Users

If you have an agent leave your office, there are several things you need to take care of that IMS can help you with. For example, you can change all remaining Todos over to another user. You can replace the agent code for the producer with a new one. You can even call Xanatek for more personalized service like splitting up a current producers book up between two agents or marking all of someone's old clients with a status code so that you know where they originated for future reporting use. Below are directions you can use to move all Todos to another user. If you would like assistance making any other changes mentioned here, just call (800)820-1665 and a member of our friendly tech support team will help you organize IMS after someone leaves the agency.

How To Move ALL Todos from One User to Another

When you make that user inactive you are given an option to move all of their remaining Todos to another user of your choice.

1. Open *Maintenance*
2. Select *Users*
3. Click to select the user you want to make inactive
4. Click *Edit*
5. Uncheck the *Active* box
6. A pop up box will appear asking if you'd like to move that user's Todos to another user.
7. Answer Yes
8. Choose use you would like the inactive users Todos to be moved to

All the tips in this series will be recapped live via

attend.

All are welcome to join us as we recap tips in the current series.

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

webinar on August 27, 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.

Cold Hard Cash!

Xanatek is sponsoring a referral contest for the month of August and anyone can get in on the action! Between now and August 31st ANY referral you send to Xanatek will be entered into a drawing to win a \$250 visa gift card. There is always an opportunity to receive a referral bonus, but this is different. The person you refer does not have to buy in order for you to win. Just fill out our [online referral form](#) so we know who sent them and your name will be entered to win some cold hard cash. Send 10 referrals to Xanatek and get 10 entries into our drawing.

Every entry has a change at extra spending money through our referral program offered year round. (See full details below) If you are the winner and you were also the first person to refer someone to Xanatek and that referral purchase an IMS system you will be rolling in even more dough!

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

Boot Camp 2010

Did you think that you missed out? Well there is still one more chance 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 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

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.

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