



## Weekly Newsletter

August 13, 2010

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[sales@xanatek.com](mailto:sales@xanatek.com)

### Webinar

**Date:** August 27, 2010

**Times:** 11 AM and 3 PM

**Topic:** Manager Help

### RSVP:

[Dburkart@xanatek.com](mailto:Dburkart@xanatek.com)

**Please Include:** Agency Name, Name and Email Address of attendees,

### Tip of the Week!

#### Agency Records

Do you have a filing cabinet in your office where you keep all of the paperwork pertaining to your agency? Paperwork like carrier records, vendor records or employee records all under lock and key? Did you know that IMS offers a secured location for this information to be kept paperless? IMS offers an electronic filing cabinet called *Agency Records*. Here you can keep everything you need to store about your agency, paperless and with limited access. Anyone with supervisor rights to IMS can grant or deny access to Agency Records for other users. If you have access to Agency Records it can be found on the *IMS 3 Menu* under the *Other* Section. Just click on Agency Records to check it out.

Is this news to you? Are you wondering how to use the Agency Records part of IMS? Well, if you know how to use a Client file, you already know how to use Agency Records. Notice that Agency Records is set up just like a Client file from Primary Information, Contact Information, Notes, Images Attachments, Todos and more! Anyone with access to the Agency Records can look up, view, edit or add information to the Agency Record so that everyone with access can share it.

#### For those of you without Agency Records access

We haven't forgotten about you. Does it sound like a great idea to have a place to keep all of the names, addresses and phone numbers of the places you call and always have to look up? Could you use a shared location to keep track of all you carrier and vendor phone numbers electronically? We give you, the *Address Book*. Located on the *IMS 3 Menu* under the *Main section*, I invite you to take a look at the Address Book. The Address Book offers a chance to get rid of that spreadsheet of phone numbers once and for all! Add carrier information into the Address Book and

time each would like to 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](mailto:tstansbury@xanatek.com) and we'll send you the paperwork!

store contacts for all the departments, extensions and adjusters you have. Do these numbers change often? No problem, simply edit the file, update the information and presto, everyone can see and share that new information!

All the tips in this series will be recapped live via 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](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. As always you are also welcome to call for support directly at (800)820-1665.

### **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

#### **Xanatek User Group Meetings!**

Xanatek will begin hosting user meetings again September 16th, 2010.

Who should attend: Anyone that uses IMS! We encourage you to bring as many people from your office as you like. It will be a relaxed business casual atmosphere to listen, learn and provide input.

Why attend:

- Ask Qquestionss
- Get training
- Tips on using IMS
- See latest updates
- Tell us what you like and don't like
- Tell us what we need to change
- Get information on future updates
- Demo the Call Center
- Hear what your peers have to say
- And more

Date: September 16, 2010

Place: [Hilton Garden Inn Raleigh Triangle Town Center](#)

6412 Capital Blvd, Raleigh, North Carolina, USA 27616

Tel: 1-919-876-5650 Fax: 1-919-876-5605

Time: 9:00am to 12:00 pm

Cost: \$69.00 Per Agency

Date: September 23, 2010  
Place: [Hampton Inn & Suites Columbus-Easton Area](#)  
4150 Stelzer Road, Columbus, Ohio, USA 43230  
Tel: 1-614-473-9911 Fax: 1-614-473-9922  
Time: 9:00am to 12:00 pm  
Cost: \$69.00 Per Agency

We encourage you to bring as many people from your office as you like. It will be a relaxed business casual atmosphere to listen, learn and provide input. Please RSVP to [Brent Sheppard](#) if you are attending and how many will be with your group.  
Not close enough to you? Stay Tuned. We will be announcing more locations in the near future.

### **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](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

### **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)

### **Be a Fan of Xanatek**



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

✉ **SafeUnsubscribe®**

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