



Xanatek Weekly Newsletter

August 14, 2009

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Contact Information

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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](#)

Come and see us or send

Tip of the Week!

Receipts and Billing Custom Memo

Let IMS help you "get the word out" with one of our newest features. The ability to add a Custom Memo to any Receipts or Agency Bills you create in IMS is now available with our latest version of IMS, 3.6.4! This Custom Memo could be used for almost anything. Maybe a service feature? Consider the idea of using the memo to inform your customers when your office will be closed in observance of upcoming holidays. Possibly a sales tool where you choose add a new sales topic each month to appear on all of your Receipts and Bills to encourage questions about products that are new or not widely used. Whatever you dream up, you can use this tip to put IMS to work for you.

How To:

1. Open Receipt and Billing from the IMS 3 Menu.
2. Choose the "Edit" drop down from the file menu found above the buttons in the Receipts and Agency Billing window.
3. Click to select "Edit Custom Memo"
4. Type youe memo into the Edit Custom Memo Window and click "Ok"
5. The memo you added will appear on all the Receipts and Bills you print.
6. Change this memo as ofter as you like by repeating steps 1-5.

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

IMS Error Messages

When an IMS Error Message appears, please take a moment to review what you had been doing. We do not want you to ignore them. Sometimes pressing "ok" will allow you to continue, but what you were

a referral.

See Referral Program details
below.

trying to accomplish, may not have worked. We would rather have you be safe than sorry. Here are a few tips to help us help you.

Rules of Thumb

- Take note of exactly what you were doing at the time you received the error.
- Check to make sure any information saved, scanned or entered was kept.
- Closing and Re-opening IMS can sometimes be the solution in order for IMS to reconnect to the database.
- Call (800)820-1665 for technical support if you feel you need any assistance.

Example: If you get an error while scanning. Take note of what part of the scanning process you were at when you received the error. Check to see if the Image is located in the file you were transferring the Image to. If it is not there, you may choose to try re-scanning. Sometime a fresh connection is all you need, but as always, please feel free to call Tech Support if your image is not showing up in IMS. This could be an opportunity to assist you with a larger issue that you do not want to continue to overlook.

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. We love referrals and I am sure you do too! Below you will find our rules on paying referrals. PLEASE read carefully as I often get calls long after the install asking for the referral payment. We must be able to verify you are the reason the agent purchased or contacted Xanatek.

The key things to remember:

- The agent must be NEW to IMS - agents already in our system may not qualify.
- YOU must have provided Xanatek with the contact information prior to Xanatek contacting the agent.

A referral will not qualify if:

- A Xanatek sales representative has already been in contact with them.

- We have no way of verifying you were the referring agent.
- Another agent has already referred them.
- You call many weeks or months after the user has installed IMS and you ask for referral after the fact. (Exception: if we have previous documentation supporting your referral.)

We do our best to track all the leads you provide us. Please contact us with any questions. The best way you can refer someone is to email Brent@xanatek.com

Here are the official 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

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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