



Xanatek Weekly Newsletter

September 11, 2009

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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!

Managing Contacts

Have you ever needed to move a contact out to become a primary record? Did you type their information into IMS over again? Did you know that IMS offers shortcuts to help you manage your contact records as they grow and change? Use this tip to help you manage your contacts with ease.

Options:

- **Move Contact to Primary** allows you to take all of the selected contacts information (name, address, ssn, birthday, etc.) and move it out to become a primary record in IMS.

Examples: Use this option in the event of a divorce where the former spouse now also needs their own individual record. You may also find this useful when there is a spin off from the policy, maybe a child is grown and in need of a file of their very own.

- **Switch Contact with Primary** lets you swap out the primary record with the selected contact.

Examples: You could use this option to switch the contact that you usually speak with out into the primary record so that their name appears in the search list. This is especially helpful if the contact does not share the same last name as the current primary record. You could also use the feature to switch the remaining contact to become the primary in the unfortunate event of a death.

- **Sync all Contacts with Primary** helps you save time when a family moves.

Examples: If you have a family of contacts and the family moves you can change the primary address and then sync ALL contacts to contain the new address in one step rather than having to edit each contact

a referral.

individually.

See Referral Program details
below.

How To:

1. Go to the Contact tab
2. Select the Contact record you wish to manage by clicking on it (The selected contacts name will become highlighted)
3. Click on *Edit* (Located above the buttons at the top of the screen)
4. From the drop down list that appears, click to make your selection: Move Contact to Primary, Switch contact with Primary or Sync all Contacts with Primary

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

Boot Camp!

Want to get more out of IMS? Then join us for Boot Camp, November 12th and 13th, 2009!

IMS Boot Camp will inform, educate, and stimulate your office! We limit each class to a maximum of 12 people. In most cases at least 8 agency's will be represented from various states. The classroom environment provides the opportunity to learn from our instructors and your classmates. Each attendee is supplied with a computer so they may work along with the instructor. Ample time is given for questions and open discussions.

Xanatek provides lunch both days and all your classroom material!
Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

Moving IMS to a New Server

As many of you know, or have experienced, the Technical Support Team is happy to help you move your IMS system to a new server.

Server moves often require several hours work. In order to better serve you and our other customers we ask that you call us to schedule this procedure with our staff 24 hours ahead of time. Scheduling will allow us to dedicate a technician to you.

If you call the same day, we will make the best effort possible to accommodate you, but we may require the process to be completed the next business day.

Thank you and please contact me directly if you have any questions at Brent@xanatek.com.

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

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

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