

[<Back](#)

 [Print](#)



January 15, 2008

Topics

- **Tip of the Week!**
- **New branding in 2008**
- **What to expect in 2008 from IM3**
- **ARE YOU GETTING ENOUGH OUT OF IMS3?**
- **Tip of the Week**
- **Boot Camp Schedule – Sign up for April and May**
- **Notice on page limitation!**
- **[Referral Program – Updated! Please READ!!!!](#)**
- **Call Center Available - Have you thought about it? (and Pricing)**

This email is being provided to you as a user of Insurance Management Solutions for Insurance (IMS)

TIP of the Week! Moving Images

Have you ever scanned or zanned an image into the wrong client file or the wrong image folder by mistake? Did you know that you can move the image from the wrong file or folder into the correct one without rescanning through the move function in Maintenance?

To get to the move function look under the Tools heading on the IMS Main Menu, select Maintenance. This will open up the Maintenance portion of IMS. Click on the Move button and the move function will display on the right side of the window.

Step 1:

Index: click to select the client, prospect or agency record of where the image was placed by mistake.

Image Group: Click to select the folder were the image was placed by mistake.

Continue: Click to display the images located in the selected image folder under Step 2.

Step 2:

A line list of all images in selected image folder will display under Step 2.

Click to select the image(s) that you'd like to move.

To select more than one: Ctrl+Click.

Step 3

Index: click to select the client, prospect or agency record where the image should have been placed.

Image Group: Click to select the image group folder where the image should have been placed.

Transfer: Click to transfer image from the incorrect file to the correct one.

New Branding in 2008

A few of you have asked what do we say to carriers; do we have Xanatek or IMS? In 2008 you will see many changes at Xanatek. One of which is a new website, some new graphics and a focus on the company name of Xanatek. About 2 or 3 months ago we added Kristin Hall to the staff. She is a graphic designer and is redeveloping all our material. In short, the focus will be on the company name Xanatek. IMS I will be renamed to IMS or Insurance Management Solutions followed by a number. For example, IMS3 means you are using Insurance Management Solutions version 3.

We simply are going to refer to ourselves as Xanatek. So, when you are talking with a carrier or anyone else, just call us Xanatek!

What To Expect in 2008 from IMS3

When is the next update? What is going to be in it? These are just a few questions that we get often at Xanatek. 2008 is going to be a big year. Although I am not prepared to tell you everything about the software, I am going to share a few of the BIG items you will see in 2008.

Many of the things on our current wish list will be added.

Accounting - we will be adding complete accounting with the integration of Quickbooks. From account current to financial statements, utilizing IMS3 and Quickbooks will give you a total agency solution. Initial limited rollout will be April.

Transformation Station – Yes! IMS3 will be going real-time. In July we will start rolling out real-time downloads and more

from the carriers that support it. Click a link and get the up to date information from your carrier. Billing, Claims, and eventually rating.

We are striving to provide you the best possible system at lowest possible cost. You already know we offer the best document imaging in the industry! Our enhancement will have all the functions of those really EXPENSIVE systems at a cost you can afford! The same thing you are paying now!

Stay tuned, 2008 is going to be productive and exciting!

ARE YOU GETTING ENOUGH OUT OF IMS3?

I often chat with new and old users. New users tell me that they went to visit a “current agency” using IMS and then ask “why are they not using this part of the system?”

I encourage you all to examine how you are using IMS3 quarterly. In order for you to get the most benefit of the system, you need to use it! Many new functions are have been added. Maybe you never learned about some of the old functions. Either way, chances are we can help your business in many ways you never dreamed. Let us help you!

There are several ways we can help your office better utilize IMS3

- 1) Call us – We are always a call away! If you don’t ask, we cannot help.
- 2) Boot Camp – Attend a boot camp – get 2 days of detailed training. In addition, there will be many peers from different areas of the country that you can exchange ideas with.
- 3) Xanatek On-site Consultation – Don’t want to attend boot camp, but still want to get up to speed. We have always offered additional on-site training, now we have put it on steroids. A trained Xanatek professional will go to your office and perform the following functions:
 - Review your network and make suggestions on hardware and software.
 - Spend 2 to 3 hours analyzing your work flow and office to evaluate how we might improve your utilization of IMS3.
 - Meet with owners/managers to discuss findings.
 - 3 hour group training with staff to implement changes

All of this for \$1000 includes travel and all expense. If you are interested, contact Brent@Xanatek.com

Boot Camp Schedule Through May 2008

April 3 & 4

May 22 & 23

As a note, Xanatek may change the date due to lack of attendance or unforeseen circumstances beyond our control.

Notice on Page Limitation –

Recently a few customers have tried to transfer more than 250 pages in a single batch to a client file. We currently have a limitation of 250 pages. Depending on your version of software, you may receive an error or the file may be corrupt. We apologize for any issue this may cause. We will be changing this in a future update. In the meantime, please remember to keep your transfer of images to less than 250 pages.

Referral Program – Updated – Please read the fine print!

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 IMS3 and for Image Archiver.

******Please send us email, fax, or phone call before the prospect makes a purchase. We often get many people saying they refer the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. We will no longer pay the referral fee after the client has purchased and you have not contacted us. Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.**

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 notify us of the lead. Please call, fax, or email us with the lead information before they purchase. We must get name and phone number to contact them. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.

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.

Call Center is now available for your agency.

Until now, only large corporations with large budgets have been able to track and analyze all there incoming calls automatically! Xanatek is please to offer the Call Center! The Call Center is a powerful call tracking and reporting system that utilizes your incoming phone lines, caller ID and links with Insurance Management Solutions (IMS3). If you have looked for this technology in the past and found it to expensive, then look now, it's affordable! Just like IMS3, it will make your office more productive and efficient!

The Call Center has been designed to help you document and analyze your incoming and outgoing phone calls. All business owners know the importance of documenting conversations and logging all calls from customers. The Call Center will automate the process and much more!

Here are a few features that the Call Center offers:

- Logs all incoming calls
- Forces users to document conversations
- Tracks the number of calls each person handles
- Tracks all dropped calls
- Tracks all unanswered calls
- Tracks all transferred calls to voicemail
- Reports on average call length
- Reports on customers that call you the most
- Reports on daily call load (total number of calls)
- And much more!

The Call Center utilizes your current phone lines and caller id. All the equipment and warranty you need will be provided by Xanatek.

No changes to your current phone system are needed. Some additional wiring may be needed.

Pricing

*You must have Caller ID on each incoming phone line for the system to work.

Number of incoming phone lines.

4 Lines	\$1395
8 Lines	\$1895
12 Lines	\$2195
16 Lines	\$2395
24 Lines	\$3195
32 Lines	\$3895

If you have more than 15 users or a Novell File server – a separate computer may be required to run the system. Please contact Xanatek for more information

Monthly Fee Will be \$25 per month.

We would like to email this newsletter to everyone in your office. Please send a list of all email address's in your office to tech@xanatek.com.

[Forward email](#)

✉ [SafeUnsubscribe®](#)

This email was sent to brent@xanatek.com, by dburkart@xanatek.com
[Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).

Email Marketing
by



Xanatek, Inc | P.O. Box 160 | Granger | IN | 46530