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January 22, 2008

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

TIP of the Week!

Inserting a Word Document for use with IMS Letters function

Did you know that you are not limited to only using the letters that are already in IMS?
You can create and add your own Word documents for use through IMS Letters function as well!

Creating a New Document

To create a new document for use with the IMS Letter function, select the “Letter” button either from the Client or Prospect File or after running a report. Selecting the Letter button will open the list of Documents available. To create a new document, click to select the default letter and then click “Open” or “Open Letter” to open the default letter that we have created for you with merge fields already inserted.

Note: When opening a letter through Clients/ Prospects the “Open Letter” button will be located above the list of available documents. When opening through Reports the “Open” button is to the right of the list of available documents.

Once the Default letter is open, you may type over the body of text that we have entered as a place holder for you. Then, you simply go to file and “save as” giving your document a new name. This will prevent you from saving over the default letter so that you can use it again whenever you want to create new documents for use with the IMS Letters function.

Inserting an Already Existing Document

To insert an already existing document into IMS for use with the IMS Letters function browse to the document that you wish to insert and copy it. Then browse to your Drive letter where IMS is housed, double-click your IMS folder and finally, your documents folder. Paste your already created document into your IMS documents folder. Then open IMS. Go to either a Client or Prospect file or, if you are going to be using the letter in correlation with a report, go to Reports. Once in the desired location click the “Letter” button. This will open the list of available documents that you will be adding the new document to. Click to select “Insert” and the edit letter window will appear.

Note: The “Insert” buttons can be located in the same areas as the “Open” buttons.

To browse to the document that you would like to insert, click the button with three dots on it (to the right of the first drop down). This will open the list of IMS documents that you just added your already existing document to. Click to select the document that you’d like to insert into IMS and select “Open” to load it into IMS for use with the Letters function.

As always if you have questions about this or any other feature of our program please feel free to call us at (800)820-1665.

Beta testers needed – Accounting!

In March we begin testing our new accounting link into Quickbooks. We are looking for anyone that needs to do a lot of Account Current or Agency Billing and is willing to work with us on the implementation. The new link into will take our current invoicing system to the whole new level. If you are interested in being a beta tester, please email Brent@xanatek.com

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.

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.

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