



Xanatek Weekly Newsletter

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Autopay

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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!

Tip of the Week!

Linking Clients

You can now link client accounts and move between them with a click of a button! Use this feature to link clients that may have both personal and commercial files with your agency, or to link personal files that now have grown children with their own accounts. This is also a great way for everyone in your office to quickly find all related accounts.

How to:

- Open one of the client files that you would like to link
- Right click anywhere on the primary screen or directly on the clients name in the search list.
- select "Link Clients"
- This will open a list of ALL clients (inactive accounts will have a slash through their names)
- Select the client(s) that you would like to link with the current account and check the box next to their name(s).

This will create a blue "[Linked Accounts](#)" option in each of the client files you selected for linking. Simply click on this link and a list of all linked accounts will appear. Click on any of the linked accounts and you will move directly into the client account selected.

Linking Prospects

Linking Prospects is just as easy! Follow the same steps listed above for the option to Link Prospects and the same "[Link Accounts](#)" feature will be available.

Note: You can only link clients to clients and prospects to prospects

Linking Clients is a feature available to IMS SQL users. For a conversion

appointment please contact Xanatek Technical Support at (800)820-1665.

Boot Camp

Want to get more out of IMS? Then join us for the first Boot Camp of 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!

We have fun too! Thursday night you are encouraged to have dinner with the group to further your discussions. After dinner, voluntary attendance to relax and enjoy downtown South Bend at one or more of our establishments! Our next Boot Camp is now scheduled for March 26th and 27th! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

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