



## Xanatek Weekly Newsletter

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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](mailto:dburkart@xanatek.com) and we'll send you the paperwork!

### Tip of the Week!

ACORD Form Creation

Did you know that there are now 3 places that you can begin creating an ACORD form from? The original is still an option. You can create a new ACORD form from inside the ACORD program that is available on the IMS Main Menu. There are two other locations that you can begin creating an ACORD form from and maybe help you cut out a step or two.

Misc. Tab: From the Misc. Tab within a Prospect or a Client File you can Add, Edit, View and Delete ACORD Forms. Beginning with an ACORD form from within the Client or Prospect file saves you the step of having to choose the Client or Prospects name from the index list because you started out from their file to begin with. You can also view or edit any existing ACORD forms saved to that file previously.

How To:

- Go to the client or prospect file of your choice and move to their Misc. Tab.
- Select the ACORD option. This basically turns the misc. tab into the ACORD forms tab.
- The Add, Edit and Delete buttons at the top of the screen can be used to Add, Edit, or Delete ACORD Forms.
- Double click any existing ACORD Form and it will open in ACORD for viewing or editing.

Policy Tab: From the Policy tab on a clients file there is an ACORD Forms subtab underneath the policiy listing where you can Add, Edit, View and Delete ACORD forms ordered by policy.

How To:

- Go to the client file of your choice and move to their Policy tab

- Click to select the policy that you wish to create an ACORD Form for.
- Click to move to the ACORD Forms Subtab
- You will see a green plus sign, a red minus sign, an image of a paper icon and a printer icon to the left of the subtab.
- With these you can Add (green plus), Edit (paper icon), Delete (red minus), or print ACORD Forms.
- You can also view any existing forms by double clicking on the form you wish to view.

ACORD Forms can still be created from within the ACORD program in IMS found on the IMS 3 Menu.

ACORD creation from the policy tab 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 30th and April 1st! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

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