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February 27, 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 – User Settings

Are you tired of being notified of a new e-mail every minute? Do you want to use IMS I to send e-mail messages to clients? Would you like to see everyone's prospects or just your own? The settings for these can be found in the User Settings section of the Main Menu.

The first tab associates the user logged in with the agency location (useful with agencies that have multiple offices). This also has settings to turn on the IMS I Email and Instant Messaging. Along with this, users can also specify how often they would like to be notified of a new e-mail message. This is also where you can set up the default view for your prospect settings. You have the option to view all users or just yours, the current user.

The second tab contains settings to send e-mails to clients in IMS I. While you can do this with your regular e-mail client, you may find it useful to copy the body of the e-mail to IMS I notes. If you wish to use this, you can enter your e-mail settings (check with your provider to determine these) on this tab. To continue using your default e-mail client, simply leave the "Use E-mail Settings" box unchecked.

Boot Camp Schedule – Sign up for April and May – Soon!

April 3 & 4

The next Boot Camp will be April 3&4, 2008! We already have some registered! Sign up now as we limit the seats to 12. Visit <http://www.xanatek.com/bootcamp-registrationform.php> to sign up. If you have already signed up and have not received a reply, please email Brent@xanatek.com. We are receiving large amounts of SPAM and sometimes the registrations get marked as Junk.

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

Next One - May 22 & 23

Online Backup Now Offered from Xanatek!

Xanatek Online Backup provided by Carbonite

Setup Fee \$139
Yearly Renewal \$45
Unlimited IMS Storage

Xanatek is now offering online backup. We have partnered with Carbonite.

Here is what you get:

- Xanatek will install and setup your backup
- Xanatek will verify that your backup is synchronized 30 days after installation
- Data will be encrypted for safe keeping.
- Xanatek will be able to restore files for you

Call the support line at (800) 820-1665 with questions or to get started!

Xanatek To Attend Erie IT Fair in Maryland

March 26th

at BWI Marriot – Xanatek will be there and displaying some cool technology. We will be working with the Erie Branch to show enhanced productivity tools.

- 3 Monitors on 1 Computer
- The Call Center
- PDA with IMS scheduling / todo's
- PDA with Web and Email

IMS user meeting to be held in Same Day as Erie IT Fair

Attend the IT Fair in the morning and the User Meeting in the afternoon!

The location will be at the Hilton BWI Airport.

Location:

**Hilton BWI Airport
1739 West Nursery Road
Linthicum, MD 21090**

Located Next to the Marriott where the IT Fair will be held.

We will be hosting a user group meeting the same day as the IT Fair from 1:00 pm until 4:00 pm. You are encouraged to attend the It Fair in the morning and our user group in the afternoon.

Topics will include:

- New Features
- Future Releases
- Call Center

- Open Forum to ask your Questions
- And More!!!!

If you are in MD, PA, WV, or VA and an Erie Agent, you ARE invited to the Erie IT Fair as well as the user meeting. Please RSVP to Brent@xanatek.com with the number of people from your office the if you plan on attending the user meeting

Meeting Speaker

If you have a coffee house meeting or some other type of monthly or quarterly meeting and have speakers. Xanatek would love the opportunity to present our company to your meeting! If you are interested in having a Xanatek representative attend your meetings, please contact Brent@xanatek.com.

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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