



Xanatek Weekly Newsletter

April 10, 2009

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Contact Information

Xanatek, Inc.
PO Box 160
Granger, IN 46530

www.Xanatek.com
tech@xanatek.com

Tech Support
800.820.1665

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!

Holiday Hours

Tip of the Week!

Prospecting Reports

Now that you have entered prospecting information into a clients file you can report on it! The following reports are available in Prospect Reports: Prospect List, Amount Totals, Conversion, Lenth of Time as a Prospect and Expected Close Date. You can even use a date range to track prospects by week or month.

How To:

Locate the Prospect Reports on the IMS3 Menu under Tools and click to open it.

- Select the prospect report you would like to run from the first drop down under Reports on the top left hand side of the Prospect Reports window.
- Under Search Criteria select and Agent and the date range you wish to report on.
- Click the Report button on the bottom left to show results
- At the top of the Prospect Reports window you will find that you can print or export

Note: If you are running a conversion report you must enter the close date in order for the prospect to appear correctly on this report. Simply moving the Prospect to Client with out entering a close date under prospecting tools will cause that converted prospect to be miss-represented as an unconverted prospect in the conversion report.

Administrative Reports are also available by agent.

Accounting Show and Tell

Tuesday, March 10, 2009 at 10:00am Eastern Standard Time we will be holding an online show and tell of our new accounting program. There will be a questions and answer session

Xanatek, Inc. will be closed in observation of Good Friday. Any voicemail or email received tomorrow, April, 10, 2009, will be returned when we re-open Monday, April 13, 2009 for our regular business hours of 8:30am to 6:00pm Eastern Standard Time.

following the presentation. If you are interested in seeing this new addition to the IMS family please [rsvp](#).

Are Your Back Ups Running Successfully?

It is a great idea to check the success of your back-ups frequently. If you (or your tech) can check this about once a week, it could save you the frustration of realizing, all to late, that they were not successful. No matter what form(s) of back-up you use, we recommend that you be involved in knowing your back-up process.

Note: If you are using the IMS CD Burning as a form of back ups, it's simple. Just check the burn log after each cd burn and make sure that the success was marked true.

If you are using other forms of back up, and are unsure how to check the success, you should consult the person(s) that set it up for directions on checking the success of your back-up.

IMS Scheduler (Monthly View)

If you have more than three appointments per day, the monthly view of IMS Scheduler has a trick up its sleeve. When this occurs, up and down arrows appears for you at the right of the week(s) containing the three, or more, appointment day (s). You can use the arrows to scroll through multiple appointments. The arrows scroll that week as a whole. Make note that if you scroll through the appointments to see all appointments for any given day you may have to scroll back up to see the appointments of another day. Please keep this in mind when using the monthly view.

Last Week's Tip in Review

Prospecting Tools

Prospecting Tools is found in IMS under the Misc. Tab of Prospects or Clients. You can use this tool to track prospects based on agent, priority, probability of closing, est. date of closing, amount of prospective sale and policy type.

How To:

- Open Client or Prospect file you wish to track
- Move to the Misc. tab
- Select Prospecting Tools from the drop down list
- Click Add at the top of the screen to begin adding prospective information
- The Edit Prospect Data Window will open
- Enter the information you wish to track: Agent, Amount, Priority, Policy Type, Est. Closing Date, Closing Date, Probability of Closing. These entries are based on your interpretation of the length of time it will take to close and the amount you expect would be associated.

Note: This information can be tracked both for your own personal assessment or for Administrative Purposes.

Boot Camp

Want to get more out of IMS? Then join us for the first Boot Camp of 2009! There are still seats available.

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

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