



Xanatek Weekly Newsletter

April 24, 2009

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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!

Boot Camp

There are still a few seats available to our next Boot Camp scheduled for April 30th and May 1st! Cost will be \$249 per person.

Tip of the Week!

More Prospect Reporting Options

You can report on Prospect information using IMS Reports as easily as you can report on Client information. Here are a few things to keep in mind.

How to:

1. Open "Reports" on the IMS 3 Menu under Tools
2. Locate "index" above the buttons on the top left of the IMS 3 Reports window
3. Change the selection by clicking on "Prospects"
4. Now the IMS 3 Reports window should display "Prospects".

Note:

- Any time that you wish to report on prospects through IMS Reports you must change index to Prospects from Clients
- You can use any report you already have saved as a client report for prospects
- You can use IMS Reports to print Letters, Labels and Envelopes for your prospects

For more information on IMS Reports, Letters and Labels from our tips of the week released fourth quarter last year, [click here](#).

Getting the Most Out of IMS Tech Support

Did you know that you can schedule IMS tech support with Xanatek? An example of technical support that may benefit from scheduling in advance would be a server change over. We are always happy to help, but it is not always possible to help with a large service job at a moment's notice. We would really appreciate scheduling of any major work needed for IMS at your office in advance. Calling ahead to schedule lengthy procedures will ensure that someone is available to assist you at your convenience. We are

Xanatek provides lunch both days and all your classroom material!

Register now at [Boot Camp](#).

For hotel recommendations visit [Boot Camp Info](#).

available for technical support Monday - Friday 8:30 AM to 6:00 PM EST. You may reach us at (800)820-1665 to scheduled technical support for your IMS system.

TeamUp

There was a recent Java update that has been found to be removing TeamUp from workstations. We have had a few reports of this and wanted to pass along the information to you. If you use TeamUp as a method of downloading, please check to make sure that you still have the TeamUp icon on the desktop that you are used to seeing it on. Usually the desktop of the workstation that handles your downloads. If you are not sure if you used TeamUp, below is a list of a few major companies that we know to use TeamUp as their downloader. If you notice that your TeamUp icon is missing please contact the carrier you write with that uses TeamUp to notify them that you need a new instance of TeamUp installed.

- Countryway
- German Mutual
- Grange
- Merchants
- Millville Mutual
- State Auto
- Tuscarora Wayne Mutual

Erie Premiums

Erie is now sending personal line downloads with premiums and fees added together. This is being done in preparation for commission downloads, but it has presented some new challenges. What this means for you is that your total Erie Premium being downloaded will appear higher than expected. Erie is interested in receiving your feedback on this change. Please respond with your opinion to Steve@xanatek.com so he may pass your thoughts on to Erie for consideration.

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 too 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.

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