



Xanatek Weekly Newsletter

April 3, 2009

In This Issue!

Autopay

Tip of the Week!

Article Headline

Outlook Sync

New Boot Camp Dates!

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!

Tip of the Week!

Prospecting Tools

Prospecting Tools is found in IMS under the Misc. Tab of Prospects and 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.

New Lines of Business Being Downloaded by Erie

Erie notified their agents this week that they are now downloading more personal lines! In addition to Personal Auto and Home they are now downloading the following:

BTP - Boat
DP - Dwelling
IMP - Personal Inland Marine
MHP - Mobile Home Protector
PCL - Personal Catastrophe Liability
UDW - Ultrasure for Landlords

If you are already downloading Personal Auto(APV) and Home Protector(HP) you DO NOT need to request the Initial Load on the Personal ACORD Interface Preference Form. You should request the initial load for any new lines of business you wish to download from Erie to update your IMS Erie Book to be the most current. You may also visit our website for [Erie's set up instructions](#).

When the new lines download they will appear in the IMS Download Program called AL3 Import Utility and your daily steps will remain the same. Step One: Transfer will link the new lines of business to policies already entered into IMS by policy number. Any new policies will be available for assignment through Step Two: Assign.

Outlook Sync Is Now Available!

Please contact Xanatek Technical Support at (800)820-1665 to schedule an appointment for installing Outlook Syncing to your IMS features. Each appointment will be about one hour long. Appointment time will vary depending on the number of workstations that need the sync feature. Only the first 5 - 10 minutes of this process would require everyone to be out of IMS in the office. Installing Outlook Syncing will require a connection to your offices server and a brief connection to each workstation interested in using the syncing tool.

Outlook Sync Features

- Syncing of IMS scheduled appointments and todos with Outlook will take place once every minute or on demand.
- Appointments and todos will be added and or updated so that you always have your most up-to-date schedule on hand.
- Syncing also makes this information available on any handheld device supporting Outlook.
- You will now be able to download your IMS primary client, address book, prospect or global prospects information from IMS to become Outlook contacts.

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](#).

✉ **SafeUnsubscribe®**

This email was sent to brent@xanatek.com by dburkart@xanatek.com.
[Update Profile/Email Address](#) | Instant removal with [SafeUnsubscribe™](#) | [Privacy Policy](#).

Email Marketing by



Xanatek, Inc | P.O. Box 160 | Granger | IN | 46530