



Xanatek Weekly Newsletter

May 18, 2009

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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!

Holiday Hours

Xanatek, Inc. will be closed in observation of Memorial Day. Any voicemail or email

Tip of the Week!

Instant Messages

What IMS Instant Messages can do for you.

- Use them to instantly communicate amongst IMS users at your agency.
- You can attach client and prospect information to your instant message to quickly show who is calling.
- Use the Client/Prospect information attached to link directly into their contact information and/or their Client/Prospect file.
- Send an Instant Message directly to Notes in a Clients file.

How To:

Attach Information

1. open an instant message
2. select IMS user you want to message
3. click the attach button
4. select the name of the client/prospect you wish to reference
5. click "ok"
6. click "Send"

Note: The list that appears when you select attach is a typomatic list just like the list you find in the Client files. To change from viewing your client to your prospect list, click the down arrow on the icon in the top left hand corner of the list window and make your selection. Once you send your message with Client information attached it become a link for both you sender and the recipient of the instant message to quick accesses.

Link to Attached Information

received May 25th 2009, will be returned when we re-open Tuesday, May 26th 2009 for our regular business hours of 8:30am to 6:00pm Eastern Standard Time.

1. Locate the Client/Prospect's information highlighted in blue and underlined after the word "Attached:" in the body of your instant message (sent or received)
2. click on the name and a link will open to the files contact information
3. Locate the file name highlighted in blue and underlines at the top of the attachment pop up window
4. click the name and you will be directly linked to the attached file

Send "To Notes"

1. Open "Email" from the IMS Main Menu located directly below the Instant Message Selection. This is the inbox/ sentbox for inner office communication including your instant messages.
2. Select the message you wish to send to notes. The message will highlight in blue
3. Click the "To Notes" button at the top of the screen
4. You note will either directly attach to the file it was attached to or allow selection of the file it belongs with is no attachment was made prior to sending/receiving the message

Note: You can use this in place of creating a duplicate note to show that you relayed a message to someone else in the office or to simply prevent you from typing the same piece of information twice!

Additional Information

The instant messages only appear instantly when both conversationalist are logged into IMS. If you send a message to someone who is not logged in. The message will not appear until the next time the person you instant messaged is logged in.

If you have someone who will be away from the office for a while and your office is a fan of the broadcast instant messages you may want to consider turning off the instant messages for that person until they return.

Boot Camp

Want to get more out of IMS? Then join us for Boot Camp, August 6th and 7th, 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 April 30th and May 1st! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

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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