



## Xanatek Weekly Newsletter

Special Addition April 30, 2008

### Tips of the Week!

IMS Tips

Scan Center Tips

Customer Service Tips

Technology Tips

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### Autopay

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### Dear Brent,

This is a special addition of our weekly newsletter. In it you will find all the tips of the week from the first quarter of 2008! We would also like to invite you to visit our newly redesigned [website](#) where you can find all of our archived newsletters, along with past tips of the week, and additional resources anytime you need them.

A special thanks to Scott Brown and Kristen Hall for giving our site it's makeover!

### BootCamp Schedule

The next Boot Camp will be **May 23 & 24, 2008!**

We are almost full. Sign up now. To reserve your seat, visit [BootCamp](#).

If you have already signed up and have not received a reply, please email [Brent@xanatek.com](mailto:Brent@xanatek.com).

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

your monthly payment  
contact us and we'll send  
you the paperwork.

## IMS Tips

### IMS Hotkeys

Did you know that you can access IMS features right from your keyboard rather than combining keystrokes and mouse clicks? You can add, edit, delete or call up other parts of IMS using the following hotkeys.

Add = Ctrl+N	Clients = F2
Edit = Ctrl+E	Prospects = F3
Delete = Ctrl+D	Scheduler = F4
Find = Ctrl+F	Instant Messages = F8
ACORD = F6	ScanCenter = F5

### 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.**

### **Advanced Search**

An Advanced Search can be done to further filter your list anytime you use the Find function in IMS. The Find function automatically pertains to whatever field or tab you were working in when you selected the find function and it will display the related search options for you. If you need to advance your search beyond what is provided right click in the Advanced Search section to add to your search. Once you have entered your additional search criteria and click search your IMS list is filtered down to only display those entries that match your criteria. To clear the search go up to Search and Clear Search from the main file menu.

### **Moving Images**

Have you ever scanned or zanned an image into the wrong client file or the wrong image folder by mistake? Did you know that you can move the image from the wrong file or folder into the correct one without rescanning through the move function in Maintenance?

To get to the move function look under the Tools heading on the IMS Main Menu, select Maintenance. This will open up the Maintenance portion of IMS. Click on the Move button and the move function will display on the right side of the window.

#### **Step 1**

Index: click to select the client, prospect or agency record of where the image was placed by mistake.

Image Group: Click to select the folder were the image was placed by mistake.

Continue: Click to display the images located in the selected image folder under Step 2.

## **Step 2**

A line list of all images in selected image folder will display under Step 2.

Click to select the image(s) that you'd like to move.

To select more than one: Ctrl+Click.

## **Step 3**

Index: click to select the client, prospect or agency record where the image should have been placed.

Image Group: Click to select the image group folder where the image should have been placed.

Transfer: Click to transfer image from the incorrect file to the correct one.

## **Letter Mergeing**

Did you know that you are not limited to only using the letters that are already in IMS?

You can create and add your own Word documents for use through IMS Letters function as well!

## **Creating a Document**

To create a new document for use with the IMS Letter function, select the "Letter" button either from your IMS Client or Prospect file or after running an IMS Report. Selecting the Letter button will open the list of Documents available. To create a new document, click to select the default letter and then click "Open" or "Open Letter" to open the default letter that we have created for you with merge fields already inserted.

Note: When opening a letter through Clients/ Prospects the "Open Letter" button will be located above the list of available documents. When opening through Reports the "Open" button is to the right of the list of available

documents.

Once the Default letter is open, you may type over the body of text that we have entered as a place holder for you. Then, you simply go to file and "save as" giving your document a new name. This will prevent you from saving over the default letter so that you can use it again whenever you want to create new documents for use with the IMS Letters function.

### **Inserting a Document**

To insert a existing Word document into IMS for use with the IMS Letters function browse to the document that you wish to insert and copy it. Then browse to your Drive letter where IMS is housed, double-click your IMS folder and finally, your documents folder. Paste your already created document into your IMS documents folder. Then open IMS. Go to either a Client or Prospect file or, if you are going to be using the letter in correlation with a report, go to Reports. Once in the desired location click the "Letter" button. This will open the list of available documents that you will be adding the new document to. Click to select "Insert" and the edit letter window will appear.

Note: The "Insert" buttons can be located in the same areas as the "Open" buttons.

To browse to the document that you would like to insert, click the browse button (the button with ellipsis on it to the right of the first drop down).

This will open the list of IMS documents that you just added your already existing document to. Click to select the document that you'd like to insert into IMS and select "Open" to load it into IMS for use with the Letters function.

Quick Tip: You can also copy the body of an existing document and paste it over the body of the text in the default letter and follow instructions for saving as, above under "Creating a Document".

## **Scan Center Tips**

### **ScanCenter Specific Hotkeys**

Get Scanned Documents = F2

Transfer = F3

Select All Images = F4

Unselect All = F5

Delete = F6

Twain = F7

ISIS = F8

## **Combining Scan Batches**

ScanCenter allows users to combine multiple batches into one large batch. To do this, left click on the first batch at the top to load the pages on the screen. Next, right-click on the second batch and select "Combine Groups". This will reload the batch with the additional pages appended at the end of the first batch.

Try this is you ever need to append pages to a scan batch before transferring into a client file.

This could be useful if you had scanned an application and will be scanning the signature later, or if you've simply forgotten a few pages.

Note: combining batches is an option only available through the ISIS method.

## **Customer Service Tips**

### **Sending out reminder letters**

When entering or updating a client's information you can use the demographics tab, on the edit information screen, to keep track of clients' driver's license expirations dates. Then you can run a report monthly to see who's driver's licenses are coming up for expiration and use letters to send a reminder to your clients to go get their driver's licensed renewed.

## **Salutations**

When adding or editing a client, prospect, or contact, the first name is automatically copied into the Salutation field. You can also change the salutation to indicate what that person goes by to make conversation and correspondence more personable. E.g. If the person's name is Ken, but he goes by Bo, you would type "Bo" in the salutation field. This Salutation is then displayed right below their address to jog your memory when speaking to them.

You can also use salutation to personalize letters. When creating a letter you can insert the salutation as a merge field to add a personal touch to the address of the letter. E.g. Dear <<salutaion>>, will read, Dear Bo.

## Technology Tips

### Permanent Storage of Personal Records

Have you ever wanted to go paperless with your personal filing system? With Xanatek's Image Archiver you can store personal tax records, household bills and legal documentation with the same ease you have come to rely on with IMS in your agency. Image Archiver for the single user can be purchased for \$395. Contact us today for a free demo or visit our website at [www.Xanatek.com](http://www.Xanatek.com).

Note: It has come to our attention that some owners have used IMS Agency Records for storing personal information. IMS Agency Records belong to the agency and are a matter of permanent record. Should you ever decide to sell the agency, personal records stored in IMS can not be removed or deleted.

### Money Saving Tip

Check out this sight to find out how to save \$25 to \$75 annually per computer in your office with a power management feature from GE.  
[more...](#)

### Time Change

You may notice that your notes in IMS are not stamping the correct time after the time change. This can be correct by updating your server's time clock to the correct time. Simply go to the server and double click on the time clock and update clock to current time. This will update all machines and notes entered from that point

forward will begin stamping time correctly again.

## Saving Space

Do you need more room on your desktop? Let IMS help you free up some much needed space. Try clicking the close summary button found at the bottom left of the IMS 3 Main Menu screen. The summary area to the right will close allowing you to move the Main Menu off to the side to make more room on your desktop while still having IMS readily accessible. Clicking the Summary button again will bring your Summary Page back into view. You can also shrink your Edit Todo windows to half their size by clicking on the blue arrow button in the bottom left of the Edit Todo window. Click the same button a second time to restore back to actual size.

Still don't have enough room on your screen? Consider dual monitors for your agency. It's not just about having more room, survey after survey shows that having two monitors increases productivity by 20% to 30%!

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