



Xanatek Weekly Newsletter

May 23, 2008

In This Issue!

Autopay
Tip of the Week!
Erie Commercial
Updated Carbonite
Meeting Speaker
Best of IMS
Referral Program

Contact Information

Xanatek, Inc.
PO Box 160
Granger, IN 46530

www.Xanatek.com
tech@xanatek.com

Tech Support
800.820.1665

Autopay

Save on the soon to be
42 cent stamp. Pay your

Dear Brent,

We are trying to gain Hartford's cooperation in certifying Xanatek, Inc. as one of the management systems that they will download to. Hartford's certification policy is to only certify a new management system once a certain number of agencies have requested that this be done. We feel that we have more than enough agencies interested and want to take a more proactive approach of informing Hartford of that interest. If you are interested in getting your Hartford policies downloaded through your IMS3 Management system please respond to sdelia@xanatek.com.

Much Appreciation,

The Xanatek Staff

Tip of the Week!

Saving Time on ACORD Form Creation

Have you found yourself recreating the same information on a certain ACORD Form over and over again? Why not create the form once as a template and reuse it?

- If you don't already have a fictitious client in

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!

Monthly Drawing

We'd like to share with you a few of our favorite things... our clients, our clients and our clients! Now we would like you to share with us three of your favorite things about Xanatek's products and/or services. We will collect your responses over the next month and a winner will be drawn to receive a \$50 Visa Gift Card!

Please send your responses to jmburkart@xanatek.com

Commercial Downloads Now Available From Erie!

Drum Roll Please! Erie is now releasing commercial downloads to all Xanatek Clients!!! Here are you few answers to some questions that you may have when visiting www.agentexchange.com.

- Your IMS version is 3.

IMS3 that you use for testing, you can create one. Just add an imaginary client and place an asterisk (*) in front of the company name. This will keep the client to the top of your list.

- Create the ACORD form that you want to use as templates for the test client, and save them with the test client information as a place holder.
- Once created and saved, you can use the template as a starting point by opening it from the test client file; simply reassign it to the real client leaving all of your commonly repeated fields filled in for less manual entry per form!

Note: An added benefit to creating a test client is that you have a safe place to practice IMS3 functions without permanently altering a live client file.

- You may go ahead and request all lines of and your book of business.
- Erie has stated that they will be processing these submissions on Sunday. Then the next upload/download that you do for Erie will create the files for your IMS AL3 Download program.
- The process for Commercail downloads is no different than the personal lines that you are already receiving, so the process of assigning through your IMS AL3 Download program will be exactly the same.

Online Backup Now Offered from Xanatek!

Xanatek Online Backup provided by Carbonite is now available for Microsoft Windows 2003, XP and Vista servers!

Setup Fee \$139

Yearly Renewal \$45

Unlimited IMS Storage

Here is what you get:

- Xanatek will install and setup your backup (must be on a Microsoft Windows 2003, XP, or Vista server or workstation)
- Xanatek will verify that your backup is synchronized 30 days after installation
- Data will be encrypted for safe keeping.
- Xanatek will be able to restore files for you

Call the support line at (800) 820-1665 with questions or to get started!

Meeting Speaker

If you have a coffee house meeting or some other type of monthly or quarterly meeting and have speakers. Xanatek would love the opportunity to present our company to your meeting! If you are interested in having a Xanatek representative attend your meetings, please contact Brent@xanatek.com.

Are you getting enough out of IMS3?

I often find that many of our agencies are not using IMS3 to it's fullest potential. I encourage you all to examine how you are using IMS3 quarterly. Many new functions have been added. Maybe you never learned about some of the old functions. Either way, chances are we can help your business in many ways you never dreamed. Let us help you!

There are several ways we can help your office better utilize IMS3

1. **Call us** - We are always a call away! If you don't ask, we cannot help.
2. **Boot Camp** - Attend a boot camp - get 2 days of detailed training. In addition, there will be many peers from different areas of the country that you can exchange ideas with.
3. **Xanatek On-site Consultation** - Don't want to attend boot camp, but still want to get up to speed. A trained Xanatek professional will go to your office and perform the following functions:
 - Review your network and make suggestions on hardware and software.
 - Spend 2 to 3 hours analyzing your work flow and office to evaluate how we might improve your utilization of IMS3.
 - Meet with owners/managers to discuss findings.
 - 3 hour group training with staff to implement changes.

All of this for \$1000 includes travel and all expense.

If you are interested, contact Brent@Xanatek.com

Updated Referral Program

Make \$100.00 to \$500.00 by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases IMS3 and for Image Archiver.

Please send us email, fax, or phone call before the prospect makes a purchase. We often get many people saying they refer the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. We will no longer pay the referral fee after the client has purchased and you have not

contacted us. Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.

Here are the rules:

1. The lead has to be new to Xanatek. If Xanatek has already spoken to the lead, it does not qualify.
2. You have to notify us of the lead. Please call, fax, or email us with the lead information before they purchase. We must get name and phone number to contact them. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.
3. First come first serve - Sometimes we will have more than one person refer the same agent. We will pay the referral fee to the first agent who tells Xanatek about the lead.
4. Paid-in-full - The fee will be paid after their bill is paid.

Here are some additional tips:

- Have the lead remind us where they heard about us. In other words, have them tell us that you sent them.
- Feel free to ask us how it's going! If you refer someone, we would be glad to keep you informed about the sales process.

Xanatek may change this program at anytime. We also reserve the right to distribute the amount between multiple lead generators when necessary. Amount of referral fee will be set at time of sale and is based upon purchase price paid by the lead.

✉ **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