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May 25, 2007

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This email is being provided to you as a user of Image Management System for Insurance (IMS !!)

### **Tip of the Week – Making a client inactive**

We've added some new functions when making a client inactive. The first, setting Active to "No" when editing a client will take you to the third tab and the "Termination Reason" field. Entering a reason here can be useful if you ever want to market to the client again. The "Termination Date" is automatically set with today's date. Second, making the client inactive will automatically make the active policies inactive. This will help keep your data clean when reporting. One final note, making a client active again will not automatically make any of the policies active.

### **EFT Payments – Monthly Maintenance**

As you all know, the US Postal service has raised the rates again. Many of you have asked if we accept electronic payments. Xanatek can accept monthly payments via VISA, MasterCard, American Express, and any debit card. We do not make automatic withdraws from your checking account.

If you are interested in monthly electronic payments, contact the office and we will send you the paperwork to get started.

## **Real Time – This is the 2<sup>nd</sup> installment of a multi-week article.**

Xanatek believes that real time has great potential as carriers develop and implement. We are committed to the adoption of real time. Over the next few articles you will hear the good, the bad, and the ugly. Our goal is to educate you so that your expectations match what real time is capable of. The more you know the better you will be able to utilize real time.

### **The Good:**

“Real time is the ability to click on a button from a client file in your agency management system or comparative rater for immediate access to carrier information on that client. The transaction may be a quote, billing inquiry, claim inquiry/loss runs, policy view, endorsements or a request for information. This approach provides a single workflow for servicing or quoting.”

[Learn More](#)

You should visit [www.getrealttime.org](http://www.getrealttime.org) as this site will give you all the good! Careful – it does not give you any of the bad.

## **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 Image Management System for insurance and for Image Archiver.

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 info. We must get game and phone number to contact them.
- 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.

### **Call Center is now available for your agency.**

Until now, only large corporations with large budgets have been able to track and analyze all there incoming calls automatically! Xanatek is please to offer the Call Center! The Call Center is a powerful call tracking and reporting system that utilizes your incoming phone lines, caller ID and links with Image Management System for Insurance (IMS I). If you have looked for this technology in the past and found it to expensive, then look now, it's affordable! Just like IMS I, it will make your office more productive and efficient!

The Call Center has been designed to help you document and analyze your incoming and outgoing phone calls. All business owners know the importance of documenting conversations and logging all calls from customers. The Call Center will automate the process and much more!

Here are a few features that the Call Center offers:

- Logs all incoming calls
- Forces users to document conversations
- Tracks the number of calls each person handles
- Tracks all dropped calls
- Tracks all unanswered calls
- Tracks all transferred calls to voicemail
- Reports on average call length
- Reports on customers that call you the most
- Reports on daily call load (total number of calls)
- And much more!

The Call Center utilizes your current phone lines and caller id. All the equipment and warranty you need will be provided by Xanatek. No changes to your current phone system are needed.

Call the office for pricing or if you have any questions!

We would like to email this newsletter to everyone in your office. Please send a list of all email address's in your office to [tech@xanatek.com](mailto:tech@xanatek.com).

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