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June 7, 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 – Combine Scan Batches

Have you ever needed 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. 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.

Real Time – This is the 4th installment of a multi-week article.

Hopefully by now you have visited www.getrealtime.org to see all the potential benefit of real time. Xanatek is committed to enabling real time, however, performance needs to meet expectations. We are outlining some of the pitfalls so that your expectations are reasonable.

Now some of the problems:

- 1) Speed – One of the biggest issues I have heard from users is speed, it takes for a transaction. You will hear many numbers from industry professionals, but I have heard as much as 2 minutes from users. Bottom line is that the speed has to be quicker than going to a carrier software or website.
- 2) Consistent Information – This is the second largest complaint! Carriers support the process at different levels, therefore, the information you get is not the same. One carrier may provide billing, but the next does not. If a CSR has to consider every transaction whether the information will be there, he will choose the least path of resistance. The least path typically results in doing what they know, going to the carrier website or software.
- 3) Passwords – you click the button to process your real time transaction and you get a weird error. The carrier website has forced, or a user has changed the password. The agency management software has not been updated, an error is generated. No one has time to deal with it while a customer is on the phone, once again they will choose the least path of resistance.
- 4) Training - Each user must be trained on how, when, and why they should use it. It is not sufficient to “tell” the office it is there! Training sessions will be needed to implement and reinforce the usage of real time transactions.

Hopefully by now you have gained some knowledge as to the problems with real time transactions. Keep these in mind as Xanatek implements real time into IMS I, we will try and remind you so your frustration is low and usage is high!

We have not determined a date as of yet for implementation. As noted in an earlier article, for most of our users it will provide little benefit at this time. More carrier adoption and support will cause us to implement sooner.

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.

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 name 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 their incoming calls automatically! Xanatek is pleased 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 be 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.

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