



Xanatek Weekly Newsletter

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Linkedin

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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!

Tip of the Week!

Updating Global Holders in ACORD

If a *Global Holder's* name and/or address changes it is as simple as updating the address in your built list of holders to copy new information to all saved copies of the ACORD form.

Global Holder: A Holder that can be added to a form for any client from a single global list.

Client Holder: A Holder that can only be added to a form to the Client that the holder was created under.

How To:

1. Open ACORD
2. Go to "Assign Data" located above the buttons on the main file menu inside ACORD.
3. Select " Build Holder List"
4. The *Add/Remove Holders* window will appear.
5. Click or type to select the name of the holder you wish to update. The Holder's name will become highlighted in blue.
6. Click "Edit" located at the bottom on the *Add/Remove Holders* window.
7. Edit the name and/or address on the fields provided
8. Click "OK" to save updated information. Note: If the information is not correct (Ex: not enough digits in the phone number) the information with highlight in blue indicating that you need to correct it before it will save.

To learn more about ACORD form creation in IMS, Click the link below to view our past Newsletter from February 20, 2009.

<http://www.xanatek.com/newsletter.php>

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!

Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

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!

Xanatek Now LinkedIn

Xanatek now has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. A few discussions have been started, but we need more.

To find the Xanatek group:

- click in the search box
- type in Xanatek as the search Criteria
- CHANGE the search type to SEARCH GROUPS (Search People is default)
- Click the "search" button

Please feel free to join and share the group with everyone you know. If you have any question or comments please email Brent@xanatek.com

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