



Xanatek Weekly Newsletter

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Autopay

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!

Events

Want to know where Xanatek will be this year?

Click [Events](#)

Come and see us or send

Tip of the Week!

New Drag and Drop Email to Notes Feature

We have just finished rolling out our latest IMS version, 3.6.4. The next few weeks will highlight tips based on the new features IMS has to offer. First on the list, the ability to drag and drop an email out of Outlook directly into IMS notes!

How to:

1. Open IMS and Outlook
2. Located Outlook Email that you want to turn into a note in IMS
3. Open the Client/ Prospect/ Agency Record file that the Outlook Email is regarding. Move to the note tab for that file.
4. Drag and Drop Email into IMS (Click the email in outlook and hold the mouse button down. Drag it into the notes area of the selected file and let go)
5. A note with automatically populate with the entire body of the email, including date and time stamps into the body of the notes and the subject line of the email in the description line of the note.

What if Attachments are on the Email?

1. Follow steps above.
2. When the note is created the attachments will be shown at the bottom that you can choose to: *Send JPG to photo, Save as Attachment or Save as to any location.*
3. right click on the image and choose your option.

Send JPG to photo: This option will send the JPG photo to your batch folder so that you can retrieve it in IMS Scan Center by clicking the Photo button. This also allows you to combine two or more photos

a referral.

See Referral Program details
below.

together in order to be able to send them to the Client/Prospect/ Agency Record file as a group of photos.

Save as Attachment: Automatically creates an attachment to the chosen records client file. This will allow you to reference and view attachment on the clients file.

Note: This is not a permanent storage option.

Save as: Is just like saving any other file onto your computer. Just chose location and give file a name.

Additional Information

- Anyone with Zan will also still have the option to open the image and Zan print it. (see Tip of the week from 1/29/2009)
- The *Drag and Drop* feature will only work with a full version of Outlook. Outlook Express and other email programs will not give you the ability to use this feature.
- If you can not attach an image, it could be your user rights. Permissions need to be set in order to use the attachment feature. This was a part of our last update, however, if you can not attach see your office administrator for set up or have them call (800)820-1665 for set up assistance.
- The sender's electronic signatures are often attachments in Outlook.

All of our newsletters are archived online.
Click the link below to view past Newsletters.
<http://www.xanatek.com/newsletter.php>

Referral Program

To: All IMS and Image Archiver Users

Re: Referral Fee 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. We love referrals and I am sure you do too! Below you will find our rules on paying referrals. PLEASE read carefully as I often get calls long after the install asking for the referral payment. We must be able to verify you are the reason the agent purchased or contacted Xanatek.

The key things to remember:

- The agent must be NEW to IMS - agents already in our system may not qualify.
- YOU must have provided Xanatek with the contact information prior to Xanatek contacting the agent.

A referral will not qualify if:

- A Xanatek sales representative has already been in contact with them.
- We have no way of verifying you were the referring agent.
- Another agent has already referred them.
- You call many weeks or months after the user has installed IMS and you ask for referral after the fact. (Exception: if we have previous documentation supporting your referral.)

We do our best to track all the leads you provide us. Please contact us with any questions. The best way you can refer someone is to email Brent@xanatek.com

Here are the official 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.

Thanks and keep referring!

Brent Sheppard

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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