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August 1, 2007

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

## Tip of the Week – Use Keyboard Shortcuts to Quickly Navigate IMS

While many people prefer using the mouse, a quick way of navigating the different areas of IMS is to take advantage of the keyboard shortcuts that are available in the system. The Function keys F2-F8 allow users to open different programs in IMS without having to return to the main menu. Below is a list of all available keyboard shortcuts, but these can also be found in the built in help system.

- F2** – Client Information
- F3** – Prospect Information
- F4** – Scheduler
- F5** – ScanCenter
- F6** – ACORD

**F7 – Email**

**F8 – Instant Messaging**

### **Catastrophic Fire - BACKUP – BACKUP –BACKUP**

I know you may get tired of us telling you to backup your software. Recently one of our IMS I users experienced a devastating loss to their agency when the building burned down. It is difficult to quickly recover from this major loss, but a backup of your data will help.

The agent was assisted by a carrier that provided an RV for temporary office space. They quickly restored the backup and were able to begin servicing their customers again. Although they have a long road to full recovery, it was made easier by having the backup available.

The morale of the story is simple – YOU NEED A DISASTER RECOVERY PLAN FOR YOU AGENCY!

### **Boot Camp! – Registration Open for October 25 & 26**

The next available Boot Camp is October 25 & 26, 2007. Sign up now at <http://www.xanatek.com/bootcamp-info.php>

We only allow 12 people per class. As of today we have 4 people already signed up.

Boot Camp gives you intense IMS I training so you can get the most out of the software!

### **Issues with DSPRO and ACORD**

Many of you may have experienced DSPRO locking up while using the IMS I ACORD module since Erie last updated their software. Xanatek has been working with Erie to resolve the issue. As of today, here is what they suggest.

*“The current workaround is to click on DSpro on the task bar 3x. This will refocus the DSpro application, and restore it on the screen. “*

Help Desk Technician III

### **AAA Insurance**

We need your help with AAA. They need agents to call and ask for downloads. Once again we ask that you call and bug them. Contact Paula Falkenberg, (317)897-3545, [psfalkenberg@aaachicago.com](mailto:psfalkenberg@aaachicago.com)

## The Hartford – We need YOUR Help – Updated

We need your help! Hartford will not setup new clients for download until Xanatek has enough customers calling and logging download requests. **Please call Maggie Kelly at 860-757-1505 in the agency download department.** Tell her you want your downloads to begin immediately with Xanatek and your management system IMS !!

## 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 addresses in your office to [tech@xanatek.com](mailto:tech@xanatek.com).**

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