



Xanatek Weekly Newsletter

August 1, 2008

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Our drawing winner for warm referrals in the month of July and the recipient of a \$100 visa gift card is...

Brad Lawton
Lawton Insurance Agency

Congratulations!

Contact

Dear Brent,

Thank you for all of your warm referrals in July! We would like to extend the offer to you for the month of August with a simple approach. We don't expect you to sell the system for us. It practically sells itself! We will take any referral that you have and enter your name into our August drawing once for each and every referral. Less work and more chances to win, plus an additional agency benefit if a lead that you send our way purchases their very own IMS3!

Please send your referrals to [Jane Marie](#).

See article below on agency referral benefits.

Tip of the Week!

Auto Update Date Field in Microsoft Word

When sending out a letter through IMS Letters are you constantly opening the letter to update the date? If so, this is a tip for you! Microsoft has the ability to insert a date field that automatically updates to the current date every time that letter is used. Imagine how much time you could save if all you had to do the select the letter from your IMS Letter list and click Print!

Information

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Tech Support
800.820.1665

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!

How to:

- Start by opening IMS Letters and selecting the document that you would like to update.
- Click Open Letter
- Once letter opens go to insert on the main file menu up at the top.
- Click to select "date & time"
- A box will appear with a selection of date formats that you may choose from.
- Once you have selected a date format check the automatically update checkbox located to the bottom left of that window.

DSPro Notes

Xanatek can now import DSPro notes that are attached to currently downloaded policies into IMS! Notes attached to Erie Personal Auto and Home and Commercial (ACV, AFV, AGV, BCL, FSG, GL, IMC, UFX, UPK, USR and WC) can be imported into IMS Notes.

- E.g. If you have a DSPro note attached to a personal auto file that note could be placed in and IMS note for the corresponding client.
- E.g. If a note is DSPro is attached to a boat policy will not transfer because boat policies are not download.

If you are interested in importing DSPro Notes for your agency into IMS please call (800)820-1665 to schedule a time.

Tip: If you have not yet requested your Erie commercial book of business it is not too late! See Erie Commercial Downloads Article below.

Agency 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 IMS3 and for Image Archiver.

Please email, fax, or call us before the prospect makes a purchase. We often get many people saying they refer the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. We will no longer pay the referral fee after the client has purchased and you have not contacted us.

Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.

Here are the rules:

- The lead has to be new to Xanatek. If Xanatek has already spoken to the lead, it does not qualify.
- You have to notify us of the lead. Please call, fax, or email us with the lead information before they purchase. We must get the referrals' name and contact information. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.
- 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.
- Paid-in-full: The fee will be paid after their bill is paid.

Here are some additional tips:

- Have the referral 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 referral.

Fall Boot Camp

Want to get more out of IMS? 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!

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!

Our next Boot Camp is now scheduled for September 18th and 19th, 2008! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

Xanatek On-site Office Consultation

Don't want to attend boot camp, but still want to get up to speed? You can hire a trained Xanatek professional who will come to your office and perform the following functions:

1. Review your network and make suggestions on hardware and software.
2. Spend 2 to 3 hours analyzing your work flow and office to evaluate how we might improve your utilization of IMS3.
3. Meet with owners/managers to discuss findings.
4. Facilitate a 3 hour group training with staff to implement changes.

All of this for \$1500. Cost includes travel and all expense.

If you are interested, contact Brent@xanatek.com.

Commercial Downloads from Erie!

If you have not yet downloaded your commercial book of business you can at anytime. All new requests are processed on Sundays at Erie. Meaning you will see

your commercial downloads through the IMS AL3 Import Utility the week following your request.

Here are few answers to some questions that you may have when visiting [AgentExchange](#).

- Your IMS version is 3.
- You may go ahead and request all lines and your book of business.
- Erie has stated that they will be processing these submissions on Sunday. Then the next upload/download that you do for Erie will create the files for your IMS AL3 Download program.
- The process for Commercial downloads is no different than the personal lines that you are already receiving, so the process of assigning through your IMS AL3 Download program will be exactly the same.

NEW - You may now chose to import any DSPro notes attached to the following commercial policies: ACV, AFV, AGV, BCL, FSG, GL, IMC, UFX, UPK, USR, and WC. If you are interested in importing these commercial policiy dspro notes please contact xanatek at (800)820-1665 or [email](#).

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