



Xanatek Weekly Newsletter

August 29, 2008

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Autopay

Pay your monthly
maintenance fee with
Visa, Mastercard,
American Express or

Tip of the Week!

IMS Users

Each person that uses IMS should have their own user account, so that everything that person does in IMS is date, time, and name stamped appropriately. Even if all that person is doing is scanning, set them up with their own user account so that anything they scan is documented as being scanned by the correct person. Below are a few tips to keep in mind anytime you set up a new user to ensure that they have proper access to IMS.

Reminders for Setting up a new IMS User

- Go to IMS "Maintenance" found on the IMS Main Menu for the Agency Principle. Select the "Users" option and click the "Add" button at the top of the screen.
- Make sure that you check off the boxes to give the new user access to the proper parts of IMS.
- While still in the "Users" section of "Maintenance" you want to be sure and give the new user access to the Image Groups as well. Move to the "Image Groups" tab for the user that you are adding and right click in the white area and grant them access to the Image groups that they will need to be able to view.

Debit cards. If you are interested in automating your monthly payment contact us at dburkart@xanatek.com and we'll send you the paperwork!

- Still within the "Users" portion of Maintenance move to the "Agency Location" tab and check off the location that this user needs to be able to work at. Even if you only have one location be sure to check off the single location so that the new user can see the clients for your agency.
- If the new user is also a Producer be sure to go into the "Codes" portion of Maintenance and select the "Agent Code" and click the "Add" button at the top of the screen to add the new user to the producer drop down for clients and prospects. Just type in the producer's name or identification number from within the agency and select the user name that it belongs with from the drop down in the add agent code window.

Boot Camp Is Right Around the Corner

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](#).

August Contest

Thank you for all of your simple referrals so far this month! The winner and new contest will be announced in next week's newsletter, so there is still time if you

have not entered yet. Remember, 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. Anyone from your agency can enter and there is 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.

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.

Xanatek On-site Office Consultation

Did you know that Boot Camp isn't the only way to learn from our years of experience? You can hire a trained Xanatek professional to 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](#).

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