



Xanatek Weekly Newsletter

September 12, 2008

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Contact Information

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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!

August Winner

The winner of the August Contest is **Ed Cooper** of **Performance**

Tip of the Week!

To Notes

Did you know that you can send the contents of Appointments, Inter Office Emails, and Instant Messages directly "To Notes" in IMS Clients, Prospects or Agency Records file that they are attached to?

Appointments

- The "To Notes" button is on the scheduler.
- click to select the appointment that you want to send to notes.
- Click the "To Notes" button to send the contents of the selected appointment to the notes in the file that the appointment is attached to.

Inter Office Email

- Click to open "Email" on the IMS3 Main Menu.
- Select the Inbox or Sentbox containing the Inner Office Email that you would like to send "To Notes"
- Select the Inner Office Email that you would like to send to notes and click the "To Notes" button at the top of the screen.

Instant Messages

- Click to open "Email" on the IMS3 Main Menu.
- Select the Inbox or Sentbox containing the Instant Message that you want to send "To Notes"
- Select the Instant Message that you would like to send to notes and click the "To Notes" button at the top of the screen.

New Contest

In our first contest we asked what your top three

Insurance Group.

Thank you for all of your Simple Referrals throughout the month of August!

favorite things about Xanatek and IMS3 were. You told us that our customer service was number one! Now we want to find out what the top three things you would like to learn more about your Management System are. Simply [click here](#) to respond and be entered to win a visa gift card! We will tally the results and produce special installments of our "Tip of the Week" based on what you want.

As always we look forward to answering your questions at (800)820-1665.

Getting the Most out of IMS3

If you don't feel that your agency is using IMS3 to it's fullest potential. Let us help you! There are several ways we can help your office better utilize IMS3. Many new functions have been added. Maybe you never learned about some of the old functions. Either way, chances are we can help your business in many ways you never dreamed. Here are few of the ways we are here to help you.

1. Call us - We are only a call away! Our knowledgeable team is available to answer your IMS3 questions, offer ideas on how to be more efficient and better utilize your management system. We look forward to hearing from you!

2. Attend a Boot Camp. You will get 2 days of detailed training. In addition, there will be many peers from different areas of the country that you can exchange ideas with.

Cost is \$249 a person. For more information visit [Boot Camp](#).

3. Xanatek On-site Consultation - Don't want to attend boot camp, but still want to get up to speed. A trained Xanatek professional will come to your office and perform the following functions:

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

All of this for \$1000 includes travel and all expense.

If you are interested, contact [Brent](#).

Missing Erie Renewals

We have had a few of our clients report that they were missing some renewals from Erie. Erie has notified us of an issue that may explain this that should be fixed starting Tuesday, September 11th. As always, please let us know when issues like this happen and we will do all we can to find a solution.

This email was sent to brent@xanatek.com by dburkart@xanatek.com.
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