



Xanatek Weekly Newsletter

September 19, 2008

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Autopay

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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!

IMPORTANT NOTICE

Last Friday, September

Tip of the Week!

Agency Location Rights

If anyone in your office is finding that they are not able to see all of the clients that should be in IMS it could be that they do not have Agency Location Rights. The rights to view the clients at your agency are usually given at the time a new user is created and is a simple step often forgotten. The Agency Location rights can be granted at any time through Maintenance by updating the User(s) that is having the trouble.

How To

Only the principle agents and/or office managers would have access to Maintenance to make this change.

- Simply go into Maintenance.
- Open up the Users section.
- Select the user that needs Agency Location rights.
- Move to that user's Agency Locations tab. (It is the last tab to the right.)
- Check the box of the Agency Location that the selected user is a part of.

Note: Even if you only have a single location you must still give every user rights to view your singular Agency Location by checking off the box mentioned above.

December 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

12, 2008, Xanatek changed mail servers. If you emailed anyone at Xanatek Last Friday or over the weekend and have not yet received a response, please contact us again. We have been finding that some emails were lost in the transition. Thank you and we apologize for any possible lapse in service this may have caused.

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 December 4th and 5th, 2008! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

New Contest

In our first contest we asked what your top three 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](#).

Call Center

Until now, only large corporations with large budgets have been able to track and analyze all there 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 Insurance Management Solutions (IMS3). If you have looked for this technology in the past and found it to expensive, then look now, it's affordable! Just like IMS3, 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. Some additional wiring may need to be done if all phone lines are not currently running to your server.

Pricing

* You must have Caller ID on each incoming phone line for the system to work.
Number of incoming phone lines.

- * 4 Lines (\$1395)
- * 8 Lines (\$1895)
- * 12 Lines (\$2195)
- * 16 Lines (\$2395)

- * 24 Lines (\$3195)
- * 32 Lines (\$3895)

Monthly Fee Will be \$25 per month.

If you have more than 15 users - a separate computer may be required to run the system. Please contact Xanatek for more information or [tour](#) the website.

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.

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