



## Weekly Newsletter

October 26, 2009

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Tip of the Week!

Last Chance for 50% off

Linktomyagent

Referral Program

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Be a Fan of Xanatek

### Contact Information

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Granger, IN 46530

[www.Xanatek.com](http://www.Xanatek.com)  
[tech@xanatek.com](mailto:tech@xanatek.com)

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](mailto:dburkart@xanatek.com) and we'll send you the paperwork!

### Events

Want to know where Xanatek will be this year?

Click [Events](#)

Come and see us or send

### Tip of the Week!

#### Make Your Own Letterhead

Do you spend money every year to purchase company letterhead and/or envelopes with your company logo on them? Do you have that logo in clip art form? How about a printer (color optional) and Microsoft Word? Then you have everything you need to create your own letterhead with IMS!

How To:

1. Click the *Letter* button at the top of any client or prospect file to open the *Letter Merge* window.
2. Locate the *Default* letter. Click to select it, then click *Open*.
3. Create your own letterhead by inserting your logo into the Default letter.
4. *Save As* new with a new name. (Ex: Company Letterhead)
5. Close letter
6. Back in the *Letter Merge* window, click *Insert*.
7. Browse to select your newly saved letterhead. (To browse, click the ellipsis button. )
8. Enter a *Document Description*.
9. Click *OK*.

Your Letterhead will now be available for use when creating any new IMS Letters. You can also follow the same steps to add your logo to any IMS Letters you have already created. You may even want to try this with the No. 10 Envelope by adding your logo to the return address area.

Also keep in mind that when you are creating an IMS Letter all you are really just creating a *Word* document with letter merge capabilities. You can dress up that *Word* document with font selection and/ or color. Let your imagination run wild between steps 3 and 4 to personalize your letterhead further to represent your

a referral.

agency.

For more information on letter creation, check out our past Tips of the Week online. [November 21, 2008 - Reporting and Letters](#)

&

[December 12, 2008 - Letters with Policy Information.](#)

Click [Here](#) to view all of Xanatek's archived Tips of the Week online.

### **Upgrade Your User Count for 50% off!**

Here is a limited opportunity to add to your user count and save money. It's the Xanatek recession buster! Offer expires October 31, 2009.

\* Add 1 to 5 users to your total IMS user count and save 50%.

\*Add 6 or more and save 25%

Examples:

Upgrade from 1 to 2 users for only \$250

Upgrade from 2 to 3 users for only \$250

Upgrade from 3 to 4 users for only \$250

Upgrade from 4 to 5 users for only \$250

Upgrade from 5 to 10 users for \$400

Upgrade from 2 to 10 \$1725

Contact Xanatek at 800-875-6033 (Sales) or 800-820-1665 (Tech) to place your order before October 31, 2009.

\*Must be completed by October 31, 2009 / No payment plans - Must be invoiced in full or paid in full by credit card

\*Appropriate monthly fee will be applied to your next month's statement

### **Announcing Linktomyagent**

It's almost here! Xanatek will soon be offering Linktomyagent.com. Simple and easy to use web forms that will allow customers or prospects to submit quotes, change requests, certificate requests, or general contact inquiries. Once received by you, they can be directly imported into IMS.

Linktomyagent.com will work two ways. A prospect could go to linktomyagent.com and search for an agent by selecting their state, city, and a list of participating agents will be displayed. The second way is a direct link from your website. For example - You can link to linktomyagent.com/youragencypage. Once at your page, your logo and contact information will be displayed.

The customer or prospect can then request a quote for Auto, Home, Life or Commercial. They may also submit a endorsement, request a certificate, general contact inquiry.

The submission data will be emailed to you and a copy to your client or prospect. Once received by the agency, you will have a way to add the information to an existing client or setup an entirely new prospect.

This is just the beginning, if response is good, we will be adding commercial line quote forms and more.

The cost will be \$200 to setup your pages and \$25 a month will be added to your IMS monthly support.

Early Bird Special - Sign up before the October 31st launch and the setup fee will only be \$100!

If you're interested, please contact [Brent@xanatek.com](mailto:Brent@xanatek.com)

### Referral Program

To: All IMS and Image Archiver Users

Re: Referral Fee 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. We love referrals and I am sure you do too! Below you will find our rules on paying referrals. PLEASE read carefully as I often get calls long after the install asking for the referral payment. We must be able to verify you are the reason the agent purchased or contacted Xanatek.

The key things to remember:

The agent must be NEW to IMS - agents already in our system may not qualify. YOU must have provided Xanatek with the contact information prior to Xanatek contacting the agent.

A referral will not qualify if:

A Xanatek sales representative has already been in contact with them.

We have no way of verifying you were the referring agent.

Another agent has already referred them.

You call many weeks or months after the user has installed IMS and you ask for referral after the fact. (Exception: if we have previous documentation supporting your referral.)

We do our best to track all the leads you provide us. Please contact us with any questions. The best way you can refer someone is to email [Brent@xanatek.com](mailto:Brent@xanatek.com)

Here are the official 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.

Thanks and keep referring!

Brent Sheppard

Xanatek Now LinkedIn



Xanatek now has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. A few discussions have been started, but we need more.

To find the Xanatek group:

- Click in the search box.
- Type in Xanatek as the search criteria.
- Change the search type to "Search Groups" (Search People is default).
- Click the "Search" button.

Please feel free to join and share the group with everyone you know. If you have any question or comments please email [Brent@xanatek.com](mailto:Brent@xanatek.com)

Be a Fan of Xanatek



Xanatek has a fan site on the popular Facebook.com. Join us today.

✉ **SafeUnsubscribe®**

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