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October 18, 2007

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This email is being provided to you as a user of Image Management System for Insurance (IMS II)

Tip of the Week – Return Distinct

Return Distinct is a function that allows you to only return a name once if it occurs more than once through out your report.

Ex: If you are running a report for all active auto policies and someone has 4 vehicles insured then that person's name would occur 4 times and the name would be displayed 4 times on your report. Marking the report to return distinct will only return the name once.

Return Distinct can be found under Index on the Main File Menu.

Click on "Return Distinct" and a check mark will be added by it indicating that it has been selected as a search feature. Click on it again and the check mark will disappear and it will be removed from the features.

Note: If you are going to save a report "Return Distinct" will have to selected before you report on the saved information.

IMPORTANT ACORD UPDATE NOTICE!!!

We have recently been notified that some of our ACORD forms are being reported 'out-of-date.' Typically we receive form updates from ACORD quarterly. But, for some reason, we have not over the last two quarters. This isn't really anything unusual – there aren't always updates quarterly. What we have found is that there were a good deal of form changes made in the May release that we are missing. In most cases this will not cause agencies any issues, but at least one form has been rejected. That form has been fixed and is in our current update, but others may appear. Currently we are working on getting these May changes in as soon as possible. You will receive an email stating an update is available when it is ready.

If for some reason, you have a form that needs fixed right away, please call and we can get a temporary fix for you right away.

Last One This Year !

Boot Camp! – Registration Open for October 25 & 26

If you are thinking about attending, this is the last opportunity in 2007! Scheduling does not allow us to hold one in November or December. The next Boot Camp may be in January or February. Sign up now!

The next available Boot Camp is October 25 & 26, 2007. Sign up now at <http://www.xanatek.com/bootcamp-info.php>

We only allow 12 people per class. As of today, we have 3 slots left.

Boot Camp gives you intense IMS I training - get the most out of the software!

Backup Off-site – Jungledisk.com – 3rd Installment

After 25 days of transfer the internet backup is working! It took a while, but once the complete backup happened, it is keeping all files synchronized. I have the automatic backup set to run every 6 hours. My final conclusion is this:

The Good

- 1) It Works**
- 2) It's Cheap**
- 3) It will protect you**
- 4) It will Give you a mapped drive letter to access your data.**
- 5) It's fairly easy to use**

The Bad:

- 1) It's slow to get started**
- 2) It would take a longtime to recover from a total crash**
- 3) You need a little computer expertise to configure and keep it going.**

Ultimately any backup is better than no backup at all. I think this is good solution in addition to your main backups! I would not rely upon jungledisk as the primary backup.

Below is the 2nd Article

Time to update you on the backup, 15 days and counting. Yes that is correct, 15 days and counting. As I mentioned earlier, I think this may be a good cheap solution, but it is slow to get started. Originally I thought I would back up 120GB of data. As time progresses I keep reducing the amount as it was going to take 22 days to fully backup.

The major downfall that I foresee is that it will take a long time to upload all your data to begin. If you have smaller amounts of data, you will be ok. I have ample amount of bandwidth to upload, I am guessing that they are limiting the amount that can be used all at once.

On the flip side, the slow upload speed may result in slow download speed. If you experience a major crash, it would take a while to restore your files. Download speeds are typically much faster than upload, but it may still be a few days before you could download all your data.

Something cool – The software will work with a virtual internet drive. Once your data is uploaded, you can access it simply by clicking a drive letter through My Computer or Windows Explorer. In my case, the software mapped drive J: to the backup. I simply go to the J: from my computer and I have access to all the files.

Below is the 1st Article

A few weeks ago at boot camp we discussed off-site backup solutions. Many wanted to know about them, how much they cost, how reliable, etc.

Offsite backup solutions are available from many different providers. The details of each will vary depending on the provider. Most solutions charge based upon the amount of data being stored and transferred. They typically provide you with software that will backup at a specified time and send you a report when completed. In short, I would ask your computer technician if for suggestions as you may need a little help getting setup.

I have recently found a solution that is very inexpensive, but is not as robust as some the more expensive providers.

Jungledisk.com is part Amazon.com. It allows you to use their enormous amounts of hard drive space for backup. It is simple and appears to work well. I am still in the initial testing phase so I will write more as I progress.

Initially go to jungledisk.com, download the software, install it, and create a new user account. Once this is complete, you can begin the backup process. It is not difficult, but you must understand directory structure to make sure your backing up the right stuff.

The good news – COST! It's is only .15 cents per GB of data per month. There is a transfer charge for the amount of data you send them, but it is also very low. I would estimate that most office would spend between \$15 and \$35 a month.

The bad news - You must monitor it yourself, no automated email reporting. The other issue I do not like is that your computer must be logged in to work. If you want to use this for a server, you must login to your server and keep it logged in as it will not run as a service.

Stay Tuned! As I learn more I will keep you up-to-date!

IMS I & Novell Servers

Please be assured that we will continue to support you on Netware. We will not be providing future updates for IMS I and Netware.

The next update of IMS I will no longer support Novell Netware Servers. Changes in technology and continued progressive development of IMS I has facilitated the need for a database change to Microsoft SQL. If you are using a Netware server, you will need to call our office for options. We will suggest to your computer person that you either convert to a Windows server, or use a Windows XP box in conjunction with your server.

Please be assured that we will continue to support you on Netware. We will not be providing future updates for IMS I and Netware.

Microsoft SQL offers many potential features for IMS I. Here are just a few reasons we have made the switch.

- Synchronization of data to notebooks and other locations
- Better access for remote locations
- Faster database access
- Industry leading database that is becoming the standard
- Future enhancements with internet access

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 Image Management System for insurance and for Image Archiver.

Here are the 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.

Call Center is now available for your agency.

Until now, only large corporations with large budgets have been able to track and analyze all their 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 Image Management System for Insurance (IMS I). If you have looked for this technology in the past and found it to be expensive, then look now, it's affordable! Just like IMS I, 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. No changes to your current phone system are needed.

Call the office for pricing or if you have any questions!

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