



Xanatek Weekly Newsletter

October 17, 2008

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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!

September Contest Winner

Linda Senko

Tip of the Week!

Last week's tip helped you tap into the "Find" Feature. This week you are going to be introduced to the "Advance Search" option available when using the "Find" Feature in IMS.

When you click on the "Find" button the "Search Index" box will appear with options the following options: General Search criteria, Index State (Active, Inactive, All), Line State (Business, Personal, All) and Advanced Search Criteria.

The "Advanced Search" directs you to use the "Right Mouse click - to Add, Edit & Delete"

How it works: Right Clicking anywhere in the grid for the "Advanced Search" option and making a selection will open up an additional 3 step window that gives you additional "Filter Line" options to add to your search criteria. Repeat to further narrow your advanced search criteria.

Below are just a few of the possibilities.

- You can search for a client or contact based on a partial phone number or email address
- Search for a contact by last name. (This is especially helpful if the contact has a different last name than the primary.)
- Find a client by tier title or occupation.
- Search notes in a clients file based on category.
- Look up policies with in a range of effective dates.

Last weeks related Tip of the Week! is listed below for your convenience.

from the

October 10, 2008

Kerr Agency

in Pennsylvania is the recipient of a \$50 Visa Gift Card!

Tech@xanatek.com

We had some issues with our tech@xanatek.com email inbox for about a week. This was resolved on October 14, 2008. We have replied to all recovered tech emails. If you have not heard back from Xanatek regarding a tech email sent prior to October 14, 2008, please contact us so that we can immediately assist you (800)820-1665.

Sincerely,

Xanatek, Inc. Staff

Tip of the Week!

IMS Find Feature

Find what you are looking for faster!

Do you ever get a call from someone that you can't find in IMS, but know that they are a customer? Or maybe, you have listened to a phone message missing an important piece of information to contact that person back, like their name. IMS can help you with both of these road blocks. Here are a few things to keep in mind when you try to find information in IMS.

How it works: The "Find" button in IMS will search for information depending on what tab you are on in IMS.

- If you click "Find" from the contacts tab, you will be able to search contact information. If you click "Find" from the notes Tab, you will be searching for notes information. Also try using "Find" from the policy tab to search by policy no.
- Don't know the entire number or name you are looking for? No Problem. IMS "Find" Allows you to widen your search to look for partial information too! Try changing *Equals* to: *Starts With* or *Contains*.
- You can choose to "Find" information located in the current record that you are viewing or all the IMS records at once by selecting the "Current Index" or "All" options inside the "Find" feature.
- You can even search by a partial phone number using the "Advanced Search" feature.

Try using your "Find" feature the next time you go looking for something in IMS and stay tuned next week for Tips on using the Advanced Search Feature!

Happening at Xanatek

Have you noticed all the new voices on the phone when you call tech support? We are growing, and fast! There have been 2 new additions to the support department. Justin Putnam and Jason Hoff have joined Xanatek as Programmers and Technical Support Representatives. Xanatek is firmly committed to the 85% answer rate of your phone calls. Their addition will help us maintain and exceed your expectations.

Service Above and Beyond

I have implemented a new employee reward program and I want to give them credit! I know our staff works hard every day to do the best job they can. If you have worked with one of our team and he or she has exceeded your expectations, please email me at Brent@Xanatek.com.

I know it is impossible for us to reach perfection all the time, every time, but we still try! I am looking for your input on the staff at Xanatek. If we have not met your expectations, email me anytime at Brent@xanatek.com so that I may address your concerns.

A Message from Brent

Over the next several months you will see many changes at Xanatek. Below you will see our newly revealed mission statement and Employee Motto. I have met with all the team members and we are all committed to it. In addition, we have subscribed to a new employee motto dubbed "PP". We call it Persistent Perfection! It may not be possible to be perfect all the time. However, that is what we are striving for.

Mission Statement

Xanatek is dedicated to continuing to provide superior agency management software designed around these primary Benefits:

- Simple to use
- Cost-effective
- Exceeds customer expectations
- Enhances business growth

Our customers shall receive the highest quality service and support in the industry. We value integrity, respect and reliability in all interactions with customers, associates and co-workers. With a workplace that provides a professional, nurturing environment and fosters personal growth, we strive to maintain our position as an industry leader in superior insurance agency management software solutions.

Employee Motto: Persistent Perfection

We are committed to nothing less than perfection in the development, production and support of our insurance agency management software solutions. These products are designed to meet the needs of our customers today - and in the future.

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 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](#).

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