Xanatek Weekly Newsletter

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Message from Brent

Boot Camp

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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!

Tip of the Week!

Prospect Views

Each IMS user has the option to change prospect settings to default to the view of your choice. You can opt to default your prospect view to show all users prospects or just your own. To change your default prospect view click on "User Settings" located on the Main Menu of IMS 3 under the Tools heading. Once the " User Settings" window is opened you will find your "Prospect Settings" at the bottom. This is where you can select the default view of your choice. You can choose from the following:

Current User: Will set default to show your individual prospects.

All Users: Will set default to show everyone's prospects.

Once you have selected a default view there may be times that you still want to view prospect filtered temporarily in a different way. You still have this option through Prospects in IMS.

Changing Current Prospect View in IMS
How To:

- Open Prospects in IMS.
- Go to the top of the screen, above the IMS buttons, and click "View".
- Choose the view of prospects that you are looking for.
- Note: You can also try this viewing option in Clients!

IMS V3.x

Development on IMS 3 will soon come to an end allowing us to work on IMS 4. However, we are not done yet! Here are the expected upgrades you will see soon.

Accounting - Full agency accounting with Quickbooks integration will soon be complete and ready for complete rollout in the first quarter 2009.

ACORD - Many of the functions you need and want will be added including limits being filled on forms.

More integration with Raters - Soon to be up and running with Ezlynz

Microsoft Outlook Syncing - We will be synchronizing the IMS Schedule and Todo list with Outlook.

File Attachments - You will be able to attach any type of file a customer record.

Transformation Station -The biggest undertaking! We plan on having policy inquiry started by the end of the year. More features will be added over time.

IMS V4
At the end of this calendar year we will no longer be adding new features to IMS 3. (Other than what is listed above.) Development efforts will be on IMS 4. We anticipate a release by the end of 2009 / First Quarter 2010. This is no SMALL undertaking. It will be a complete rebuild from the ground up! In short, IMS 4 will have a new interface, web enabled (if you want), totally redesigned with all the things you have asked for over the years. Ok, it may not include everything you want because we have gotten some crazy request, but I promise it will be a great leap in your office automation.

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.

Mission Statement and Employee Motto

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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