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October 23, 2007

Topics

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- **Call Center Available - Have you thought about it?**

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

Tip of the Week – Creating Merge Fields

Merge fields can be used as a part of a letter inserted into IMS so that client names associated to reports will be automatically inserted.

How to create a Merge Field through IMS Reports

Microsoft Word 2007

- Open/Create an IMS I Report
- Click the “Letter” button towards the top left of the Reports window
- Select a letter / label from the list
- Click “Open” to the top right side of the list of letters.
-

The selected letter will open in Word (note: Word must be installed on the machine you are using in order for these functions to work.)

- Move to the Mailings tab towards the middle top of the Microsoft Word Window.

- Place cursor where you want to insert Merge Field.
- Go up to the Mailings Toolbar to “ Insert Merge Fields” and click the down arrow to show list of things that can be merged.
- Select Merge Fields in the order that you wish for then to appear
Example: <<FIRSTNAME>> <<LASTNAME>> (be sure to insert a space between fields that contain words that should have a space between them like the example of first name, space, last name.)

To Preview what your letter will look like choose Preview Results

- Notice that if there is a field that does not apply to a particular entry it will not leave a blank space, it will just collapse the empty area to read as if the unused field was not there.
- Salutation is what can be put after a greeting to personalize a letter.
Example: Dear <<SALUTATION>>
Note: if there is no salutation enter for someone the letter will read Dear (blank)

Printing Merged Fields

- In order to print documents containing merged information: go to Merge & Finish, drop down and print documents(s).

Microsoft Word 2000

- Open/Create an IMS I Report
- Click the “Letter” button towards the top left of the Reports window
- Select a letter / label from the list
- Click “Open” to the top right side of the list of letters.
- The selected letter will open in Word (note: Word must be installed on the machine you are using in order for these functions to work.)
- Place cursor where you want to insert Merge Field.
- There will be a Mail Merge Toolbar probably below your regular toolbar. You will have to scroll over the buttons in order for their functions to come into view.
- On the Mail Merge Toolbar there will be a drop down that says “ Insert Word Fields” and click the down arrow to show list of things that can be merged.
- Select Merge Fields in the order that you wish for then to appear
Example: <<FIRSTNAME>> <<LASTNAME>> (be sure to insert a space between fields that contain words that should have a space between them like the example of first name, space, last name.)

To Preview what your letter will look like choose the View Merge Data button. (It has double arrows and the letters ABC on it. It looks like this <<ABC>>.)

- Notice that if there is a field that does not apply to a particular entry it will not leave a blank space, it will just collapse the empty area to read as if the unused field was not there.

- Salutation is what can be put after a greeting to personalize a letter.
Example: Dear <<SALUTATION>>
Note: if there is no salutation enter for someone the letter will read Dear (blank)

Printing Merged Fields

In order to print documents containing merged information: go to Merge to Printer button. It is an icon with sheets of paper behind a printer.

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.

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 game 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!

We would like to email this newsletter to everyone in your office. Please send a list of all email addresses in your office to tech@xanatek.com.

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