



Xanatek Weekly Newsletter

November 7, 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!

Dear Brent,

In September we asked IMS3 users to share with us what they wish they knew more about in IMS. There was a common thread through all the responses: Marketing! If you want to make more money, IMS wants to help you accomplish that. In the month of November you will be reminded of just how much IMS can do for you.

Sincerely,

The Xanatek Team

Tip of the Week!

Reporting

The first step to marketing is to decide what group(s) you want to market to. IMS Reports can help you create that list based on information that you are keeping in IMS. I am going to step you through one easy example and from there the sky's the limit to what kind of reports you can run in order use IMS for marketing.

Orphan Report - This report will help you find marketing opportunities amongst your existing clients. The orphan report will allow you to find current clients that have at least one auto, but no home, or the reverse.

How To:

- Open "Reports" from the Main Menu of IMS.
- Look to the right hand side where you will find manila file folder icons.
- Click the plus sign next to the "Policies" folder to open the list of pre-created report.
- Double click to select the "Orphan Accounts". This will open up the orphan report already filled out and created for you with the criteria of

active clients that have at least one auto, but doesn't have home!

- Look to the top of the screen and click "Report" to find the list of clients that may benefit from hearing about Homeowners insurance from your agency.

Note: If you'd like to run the reverse of this report simply change the word auto to read home and home to read auto.

Stay tuned next week for ways to put this report to work for your agency by incorporating IMS Letters!

Progressive Download for Boats

Effective Wednesday November 12, 2008 Progressive will begin downloading Boat policies. If you are already downloading with Xanatek, there is nothing that you need to do in order for this to take effect. You will simply start to see Boat policies begin downloading along with your existing Progressive book of business.

Watercraft ACORD forms are not auto-populated, but parts of the Watercraft Application will auto-fill. Any areas of the Watercraft Application that would still need an entry will be available for type.

Erie Cancelations

Erie made some updates to their download files that inadvertently changed the value of the cancelation date. What this means for you is that when a policy cancels, it puts the termination date as the policy start date, making it seem like it canceled the day it started. This was effective October 23rd and is only temporary.

We recommend that you run a report through AL3 (IMS Downloads) to see what cancelations were effected, if any. We have contacted Erie and will let you know as soon as you can discontinue reporting.

How To

- Log into AL3 (IMS Downloads)
- Go up to the top of the screen and select Output, then Reports.
- Click to select the following: Transaction code of XLC; Company of Erie; Import Date Range from 10/23/2008 to current day.
- After you run this report once, repeat daily with only the current day selected to keep an eye on your canceled policies until you are notified of a correction being in place.

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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