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What are we thankful for?



YOU!!!

November 20, 2007

Topics

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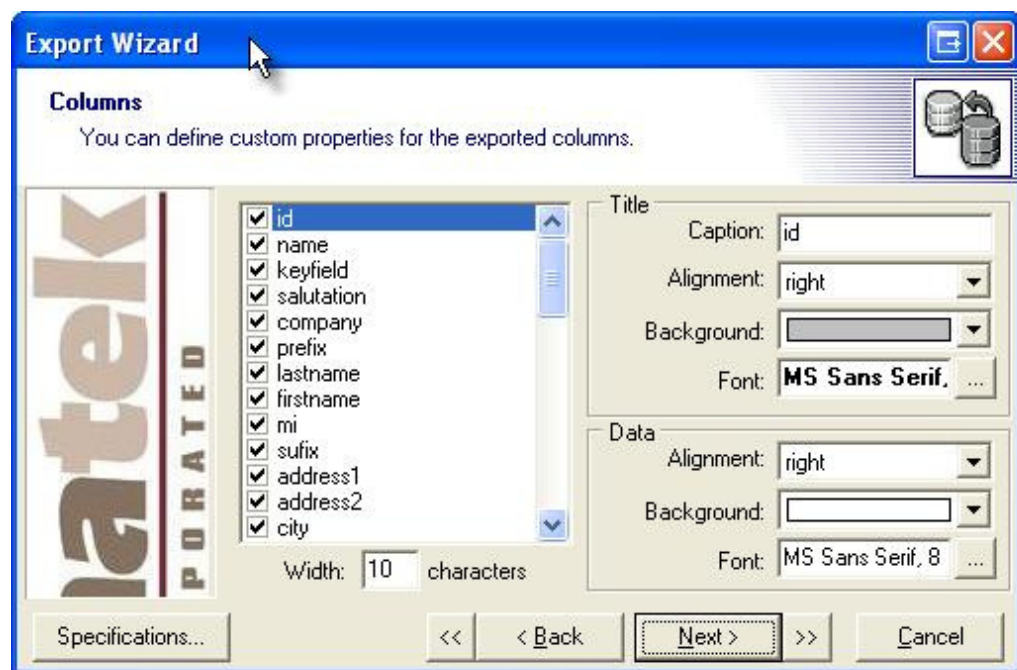
This email is being provided to you as a user of Image Management System for Insurance (IMS I!)

Tip of the Week – Choosing fields when exporting an IMS I Report to Excel

When exporting an IMS I Report to Excel you can choose which fields you would like to show in your exported report.

The 4th

Screen of the export wizard has a list of fields to choose from and all of them are selected. You can right click anywhere in this area and choose to deselect all to clear preset selections allowing you to go through and only choose the fields that you would like to show in your report.



On the last screen before you select finish, you can choose where you'd like to save the report you are exporting by selecting "browse" to browse to the location where you want to save your export.

Boot Camp January 31 & February 1, 2008

We know everyone wants to travel South Bend, in the heart of the winter. It's not sunny Florida, but it will be educational and fun!

If you want to get the most out of your software, then attend Boot Camp NOW! 2 Days of training, discussion, and fun! We take the same training that you received when you installed IMS I and expand it to 2 days. We cover all the details and more.

Sign up now at: <http://www.xanatek.com/bootcamp-registrationform.php>

Here are some comments from past attendees!

I found the boot camp to be chock-full of ideas to make my agency run smoother. I've been using IMS for 2 years already, but came away with 8-10 better ways simplify our way of doing things. It was great interacting with the other agencies in attendance as well as learning directly from the Xanatek folks themselves. Well worth the investment!"

Peter Wallin

Due to changes in staff I was put in charge of IMS from maintenance rights, doing downloads, the back-ups, and training other staff, it became very clear I needed help. Being in the class at boot-camp was an eye opener as to how much we were not doing nor were we utilizing. You possibly cannot learn everything or remember everything at the install so a refresher class is the way to go. Boot-camp was worth the time because we now have a system that is accurate, up to date, and is the core sources of information in our office. Without going to boot-camp our office would only be utilizing half of the system, why only use half of what you paid for.

Lisa M. Rains

HELP WITH CARRIERS

We still need you to call the following carriers if you represent them. Tell them you want your downloads to start with Xanatek and IMS I!

Mercury Insurance - Marvin Castillo -Business Systems Analysis-(714) 671-6571

The Hartford – Maggie Kelly – (860) 757-1505

Referral Program – Updated – Please read the fine print!

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.

*******Please send us email, fax, or phone call before the prospect makes a purchase. We often get many people saying they refer**

the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. **We will no longer pay the referral fee after the client has purchased and you have not contacted us.** Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.

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 information before they purchase. We must get name and phone number to contact them. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.
- 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 there incoming calls automatically! Xanatek is please 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 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 address's in your office to tech@xanatek.com.

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