



Xanatek Weekly Newsletter

November 21, 2008

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Contact Information

Xanatek, Inc.
PO Box 160
Granger, IN 46530

www.Xanatek.com
tech@xanatek.com

Tech Support
800.820.1665

Autopay

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Dear Brent,

It's the most wonderful time of the year again! In observance of the upcoming Thanksgiving Holiday, Xanatek will be closed Thursday, November 27 and Friday, November 28, 2008. Regular hours will resume on Monday December 1, 2008 and any messages will be returned at that time. In light of the short month, this issue is filled with extra tips. This month's topics are selected by those who responded to our last drawing. Thank you again to all who responded and we hope you enjoy this special "Tip" edition of the newsletter!

The Xanatek Staff

Tip of the Week!

Reporting and Letters

In the last newsletter you learned how to use the pre-build reports in IMS to single out marketing opportunities. This week we are going to show you how simple it is to reach out to this group and turn those prospects into policies!

The first thing you will need is a marketing letter. Once this letter is created it can be used in correlation with your reports to inform all of your orphaned accounts of what they are missing out on: Multi-policy discounts, the same friendly neighborhood service for all of their insurance needs, or other special offers you have to captivate their attention.

Merging a Letter using IMS Reports is as easy as 1, 2, 3!

1. Begin by running the report you have chosen to use, but instead of clicking the reports button at the top of the screen, click to select the "Letters" button. This opens the list of Letters

paperwork!

Thanksgiving Hours

Xanatek will be closed November 27th and 28th for the Thanksgiving holiday.

available for use with IMS.

2. Click to select the letter you wish to merge. The selected letter will then become highlighted.
3. Click the "Print" button to the right of the letter list and one Letter will merge to your printer for every name returned on your report.

*For your convenience the tip of the week on Reporting from the November 7th issue is below to refer to as needed.

Letter Creation

If you do not already have a marketing letter you can create one in IMS using the "Letter" button and Microsoft Word.

How To:

- Click the "Letter" button at the top of any client or prospect file.

A list of pre-existing letters will appear. These can be a combination of letters already created at your office or default letters that came with IMS.

- The easiest way to begin a new letter is by using the "default.doc" template that came with your IMS system.

Simply look for the letter titled default.doc, click to select it, then click the "open" button to open the default.doc up in Microsoft Word. The default.doc already has the merge fields in it that will be used to merge a letter.

NOTE: The IMS Letters function will only work if you have Microsoft Word installed on your computer. Follow the directions and type in the body of the default.doc This is the default letter.

"You can change, add and remove fields as needed! Remember to NEVER save the default letter. Always make your changes and do a "save as." Save the letter with a new name."

- This will leave the default.doc in tact for future use!

NOTE: If you already have a marketing letter created in Microsoft Word elsewhere on your computer, you may try copy and pasting the body into the IMS default letter to save time.

Once your letter has been created and saved as a new document you will need to insert it into the IMS Letters list.

- Click in the IMS "Letter" button to open the Letter Merge window.
- Click the "Insert" button inside Letter Merge window. The Edit Letter Information window will appear.
- Click the ellipsis button with the three dots on it to open the file containing the letter you just saved as new.
- click to select the letter that you just saved as new and select "Open". This will begin loading the letter you just created into IMS.
- Next select the category of letter and give the document a description on the

edit letter information window and when you are through, click "Ok".

Now the letter you just created should be listed for selection in the Letter Merge window and can now be used for individual clients/ prospect as well as groups of them based on a IMS Report!

Extra Tips!

If you would like to preview how your letter will appear before printing it out you may like these extra tips.

- View Merged Data - Click "Open" instead of print and your selected letter will open in Microsoft word with merge fields displayed. It would look something like this <<firstname>> <<lastname>>. To view the first and last name that would appear on the letter once printed look for the "view merged data" button by waiving your mouse over the buttons at the top of your opened Word document. The "view merged data" button has this symbol on it <<abc>>. Clicking this button will display the actual information that will print on the letter.
- Merge to Printer - If you would like to print an IMS Letter from with in the opened Word document you will want to use the "Merge to Printer" option. To locate the merge to print button try waiving your cursor over the button near the "view merged data" button until the button's descriptions display.

Tip of the Week!

November 7, 2008

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 a home policy!
- 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 began 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.

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Xanatek, Inc | P.O. Box 160 | Granger | IN | 46530