



Xanatek Weekly Newsletter

December 5, 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!

Tip of the Week!

Reporting and Labels

Printing Labels 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 (and Labels) available for use with IMS.
2. Click to select the Label you wish to use. The selected Labels will then become highlighted.
3. Click the "Print" button to the right of the letter list and one Label will merge to your printer for every name returned on your report.

Extra Tips!

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

- Merge to New Document - Click "Open" instead of print and your selected Labels 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 and be able to make any changed needed. Look for the "Merge to New Document" button by waiving your mouse over the buttons at the top of your opened Word document. Click this button to send your labels to Microsoft Word as their own document.

Note: Be careful not to use the "Enter" key for spacing on a Label list that you have merged to a new document. Use your mouse to click on the area you wish to change instead. Using the Enter key could

Office Closing

Xanatek will be closing at 5:00 PM on December 12, 2008.

add an additional space altering the window that each label prints in. This will cause your labels to not print correctly onto your label sheets.

- View Merged Data - 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 within 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.

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!

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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