



## Xanatek Weekly Newsletter

December 12, 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](mailto:dburkart@xanatek.com) and we'll send you the paperwork!

### Letters

If you do not already have a marketing letter you can create one in IMS using the

### Office Closing

**Xanatek will be closing at 5:00 PM EST today  
December 12, 2008.**

### Tip of the Week!

### Letters with Policy Information

Did you know that you can create a letter that contains policy information? You can include things such as the policy number, policy type, and company name right onto your letters.

#### How To:

- Go to a Clients Policy Tab
- Click " Letters"
- Create and Insert letter or Click to select an existing letter.
- Click the insert merge field button and you will have new options to select from drawn from the policy tab that you started from!

You can also use letters with policy merge fields in correlation with policy reports.

\*For your convenience a past tip of the week on letter creation is included below.

"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!

### **Erie Cancellations**

Erie made some updates to their download files that inadvertently changed the value of the cancellation 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](mailto: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](mailto: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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