Introduction to Legacy HawkSoft Help Documentation

Version 5 of the HawkSoft Management System has reached its end of support. The following documents are an offline copy of the legacy Version 5 online help portal, provided as a courtesy to your agency, which has elected to remain on HawkSoft version 5.

Please keep the following in mind as you navigate this help documentation:

- To prevent issues with size, portability, and navigability, the Version 5 help documentation has been split into nine PDF files (including this one). If a help topic contains a link to a different topic which does not seem to function properly, it most likely links to a topic contained in a different PDF file. In that case, try searching the other PDF files for the topic named in the link.
- While some topics may mention contacting Product Support for assistance, **please note that HawkSoft Product Support assistance of any kind is no longer available for this version of HawkSoft**.
- While we have done our best to remove any topics relating to online features that are no longer functional, this help documentation may still contain references to features which are no longer functional due to HawkSoft 5's end of support.
- Help and training videos are not available in this help documentation. However, you may still occasionally see references to help or training videos in this documentation.

Setup

Initial setup will ensure that your agency gets the most out of HawkSoft CMS. Most of this setup is completed as a part of your implementation and training; however, as your business grows and you add new users and new carriers, additional setup will be required.

Set up your agency network and keep HawkSoft up-to-date with the latest releases

1230 SE 3rd Ave.

Complete your agency Information

Configure agency wide settings

Set up your policies and carriers

Customize HawkSoft for your agency

Set up optional tools and integrate with third party applications

Configure and manage agency users

Users can configure their own profiles

Workstation Setup Overview

HawkSoft CMS enables you to easily configure each workstation to access and use HawkSoft CMS. Some settings are required, such as mapping to the network drive and setting folder locations. Others, like setting up external tools, and some computer-specific settings, are optional. This section of CMS Help describes how to set up workstations and modify computer specific settings for your workstation.

See General Agency Configuration for information about settings that affect all users and workstations.

System Information

HawkSoft CMS System Information is located under the Help on the HawkSoft CMS menu bar.

The System Information dialog provides details about your computer, network, and CMS settings.

System Information

Installing HawkSoft on Microsoft Windows

After CMS is installed on the server or networked workstation, each additional workstation at your agency needs to be configured

Installing HawkSoft CMS Using Microsoft Windows

Folder Locations

CMS folder locations define where program settings and data are stored and accessed. Folder locations are computer specific and are configured on each workstation when running Workstation Setup.

Folder Locations

Computer Specific Settings

Computer specific settings apply to the Windows user profile logged in. These settings include options for several CMS features, such as what programs to use when viewing images and PDFs, installing the Virtual Printer, and printer settings.

Computer Specific Settings [+Video]

Setting Up External Tools

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

Shortcuts to External Tools [+ Video]

Agency Setup Overview

Getting your agency set up to use HawkSoft CMS requires entering basic information and configuring CMS. The following articles will help you set up CMS to successfully meet your agency's needs.

Agency Information Setup

This procedure explains how to configure your agency's contact and license information in HawkSoft CMS. Your agency's information can be entered for a single location or for multiple offices.

Agency Information Setup

Multi-office Configuration

This topic will help you configure additional offices for your agency. If your agency has more than one location, you can configure your agency for multiple offices. These options also determine how policies will be assigned if multiple locations exist.

Multi-office Configuration [+Video]

Configure Agency Users

Configure Agency Users

General Agency Configuration

The General Configuration dialog enables you to configure settings for a wide range of CMS functions that your agency performs daily. Taking the time to make sure these settings support your workflow can increase efficiency, accuracy, and usability.

General Agency Configuration

Carrier Download Setup

HawkSoft CMS can be configured to accept electronic downloads from participating carriers. CMS attaches these downloads to existing policies and can automatically update policy information according to your Download Rules.

Carrier Download Setup

Policy and Carrier Setup

Policy/Company Setup is an important step in the implementation of your HawkSoft Client Management System. Information for each of your carriers is entered in Policy/Company Setup to enable you to accurately insert policies and integrate policy information with company websites. Setup also ensures the accuracy of both Trust and Commission accounting transactions, and the detail available when reporting.

Policy and Carrier Setup

Sales Pipeline Configuration

HawkSoft supports your agency's Sales Pipeline to help you track and report on your prospects to make sure your new policies move through the process from discovery to sold. It is important to configure HawkSoft to use the Sales Pipeline correctly, for accurate reporting.

Sales Pipeline Configuration

Customization Settings

HawkSoft provides a variety of customization settings to meet your agency's needs. For example, you might want to create customized Agency Announcements on the Start Page.
This article provides the steps to customize CMS.

Customization Settings

Correspondence Templates

HawkSoft CMS provides a variety of ways in which users can correspond with customers, prospects, and other contacts entered into the CMS database.

Emails, letters, memos, proposals, the Policy Overview, and text messages can be conveniently created, and then printed and/or sent from the client files using the Action menu. Data from client files can be inserted into correspondence using merge fields.

Correspondence Templates

HawkSoft Data Sync

HawkSoft Data Sync - formerly called Data Sharing - is the next step in the evolution of HawkSoft's agency management system. The service mirrors your agency's database (client and policy data) to HawkSoft's secure and encrypted cloud servers.

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace. Drip marketing, consumer information portals, and mobile applications are examples of some of the services that will be available.

This article provides steps to enable HawkSoft Data Sync. Once these steps are complete, your agency's data migrates to the HawkSoft Cloud servers. Moving forward, changes to your agency's client files are automatically mirrored to HawkSoft's Cloud servers.

HawkSoft Data Sync

HawkSoft Integrations and Product Add-Ons

HawkSoft CMS offers additional features and integrations with a variety of third-party software applications.

This article includes a variety of features and integrations for your agency.

HawkSoft Integrations and Product Add-Ons

Agency Information Setup

This procedure explains how to configure your agency's contact and license information in HawkSoft CMS. Your agency's information can be entered for a single location or for multiple offices.

The configuration settings on this screen only need to be configured one time on one computer, unless you choose to configure each computer to a specific agency name and/or address.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Agency Information
>
> See User Permissions for more information.

This task is typically performed by an Owner/Administrator or Manager.

An Owner/Manager usually enables their own permissions to include Change Client/Policy Office, Client Producer/CSR, and Agents 1-3.

Agency Information

It is important to insert agency information exactly as you want it to appear on any correspondence generated from CMS. Items such as ACORD forms, CMS form letters, receipts, invoices, email, text, and proposal templates use this information to prefill your agency's contact and license information.

> If multiple offices are entered on the Offices tab, correspondence will print the information entered for the relevant office.

1. Click the Settings icon, and then select **Agency Information**.

   The **Agency Information Setup** dialog opens.

2. Enter information in the fields exactly the way you want it to appear on correspondence generated from CMS.

3. Optional: Enter the agency **License Number**.

   > Some states require that agencies include their Agency License Number on printed materials. Once entered, this number will be available to easily insert as a merge field in correspondence. See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information on adding the License Number to correspondence.

4. Optional: Set **Default Agent Information**.

   If your agency has more than one office to configure, the following fields are located on the **Offices** > **Edit Agency** dialog. See Agency Information Setup for details.

   Client Producer and Client CSR

   You can set defaults for the Client **Producer** and Client **CSR** fields. Select a name from the available drop-downs or select "Current User".

   The Producer and CSR fields are located on the Client Name and Address screen. If defaults are set, the selection is applied at the time a user inserts a new client file.

   > Users can select any available option from the drop-down fields when inserting a new client. Once the client is saved, the user will need the following permission to change the default Producer or CSR:
   >
   > **Change Client Producer/CSR**
   >
   > See User Permissions for more information.

   Agent 1, 2, 3

   You can set defaults for the Policy **Agent 1, 2, and 3** fields. Select a name from the available drop-downs or select "Current User".

   The Agent fields are located on the General Policy Information screen. If defaults are set, the selection is applied at the time a user inserts a new policy.

Users can select any available option from the drop-down fields when inserting a new policy. Once the policy is saved, the user will need the following permissions to change the default Agent:

Change Agent 1, 2, or 3

See User Permissions for more information.

When setup is complete, click **OK** to save your changes and close the Agency Information Setup dialog.

Multi-office Configuration [+Video]

This topic will help you configure additional offices for your agency. If your agency has more than one location, you can configure your agency for multiple offices. These options also determine how policies will be assigned if multiple locations exist.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Agency Information

See Setting User Permissions for more information.

This task is typically performed by an Owner/Administrator or Manager.

An Owner/Manager usually enables their own permissions to include Change Client/Policy Office, Client Producer/CSR, and Agents 1-3.

In this topic:

Agency Codes	Users
Advanced Configuration	

To configure your agency for more than one office

See Agency Information Setup to enter your main office details before configuring multiple offices.

1. Click the **Settings** icon, and then select **Agency Information**.

   The **Agency Information Setup** dialog opens.

2. Select the **Multi-Office Settings** tab.
3. Select the agency type that best fits your agency needs.

   Your selection applies to all offices.

Description of each setting

Single Agency (No Multi-Agency Settings Apply)

This is the default setting for agencies with only one location.

Each Office Maps to an Office Name and Address

Select this option if each office is associated with a unique office name and address, and each of your locations has a unique agent (agency) code assigned with each carrier.

In the General Policy Information screen, the Agent Code drop-down will display each agent code along with its corresponding office assigned on the Agency Codes screen.

See Policy/Company Setup: Agent Codes for instructions on mapping agent codes to an agency.

Each Computer Maps to an Office Name and Address

Select this option if your agency has a shared database used by all locations, and the secondary offices are connected via Wide Area Network (WAN).

- This option assigns each computer to an office. See Local Computer: Office setting below.
- The computer the user is logged into determines the agency address printed on documentation.

> If the agency is using a Citrix or Terminal Services environment, do not select this option.

Each Office Maps to an Office Name

Each Computer Maps to an Address

- CMS uses the agent (agency) code to determine the agency name.
- The computer the user is logged into determines the agency address printed on documentation.

  See Local Computer: Office setting below.

> If the agency is using a Citrix or Terminal Services environment, do not select this option.

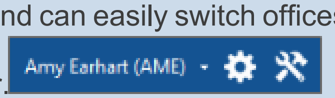
Each User Maps to an Office Name and Address

Select this option to assign each user to a specific location or agency.

The user's office assignment will determine the name and address printed on documentation generated by that user.

If this option is selected, the **Users** side-tab becomes available.

See Multi-office Configuration [+Video] below to designate an office for each user.

> Roaming Users can select the correct office when logging into HawkSoft CMS and can easily switch offices by clicking on their Username on the CMS toolbar.

Each Office Maps to an Office Name

Each User Maps to an Address

Select this option to map each office to an office name that might be different than the address each user maps to.

- CMS looks to the agent code to determine the agency name.
- The logged in user determines the agency address.

See Multi-office Configuration [+Video], below for more information.

This option is typically used by large agencies with many independent sales agents and one data processing center.

4. Select the office the workstation is assigned to.

> This option applies only when the third or fourth agency type is selected above.

Office – The drop-down menu includes the list of available locations for this agency once they are entered on the **Offices** screen.

Choose which location this computer should be assigned to.

To add offices

The Offices tab enables you to enter multiple office locations.

> Your first office listed on this tab defaults from the main office information entered on the Agency Information tab.

Agency name and information fields are used on printed materials, such as ACORD forms, memos, and letters.

Use the available buttons to manage your agency information.

Add – Click to add an agency name, location, and default information.

Edit – Select an agency from the list, and then click Edit to modify or remove agency information.

Office Details

1. Enter information in the fields exactly the way you want it to appear on correspondence generated from CMS.
2. Optional: Set

   Client Producer and Client CSR

   You can set defaults for the Client **Producer** and Client **CSR** fields. Select a name from the available drop-downs or select "Current User".

   The Producer and CSR fields are located on the Client Name and Address screen. If defaults are set, the selection is applied at the time a user inserts a new client file.

   > Users can select any available option from the drop-down fields when inserting a new client. Once the client is saved, the user will need the following permissions to change the default Producer or CSR:
   >
   > **Change Client Producer/CSR**
   >
   > See Setting User Permissions for more information.

   Agent 1, 2, and 3

   You can set defaults for the policy **Agent 1, 2, and 3** fields. You can select a name from the available drop-downs or select "Current User".

   The Agent fields are located on the General Policy Information screen. If defaults are set, the selection is applied at the time a user inserts a new policy.

   > Users can select any available option from the drop-down fields when inserting a new policy. Once the policy is saved, the user will need the following permissions to change the default Agent:
   >
   > **Change Agent 1, 2, or 3**
   >
   > See Setting User Permissions for more information.

Archive – Select an agency from the list, and then click Archive to archive the agency.

> The archived location will continue to display in the office field, followed by " (Archived)", for any clients or policies associated with it.
>
> See Data Replace Using Advanced Reports to replace the archived office with a

new office. Be sure to add the following report fields when creating your report:

Client Information: **Client Office**

General Policy Information: **Office**

Show All – Check this box to include archived locations in the list.

To unarchive a location, select the location name, and then click **Un-Archive**.

To assign Agency (Agent) Codes

Agency (Agent) codes are set up in Policy/Company Setup for each carrier. A code can be assigned for each agency.

An agency code must be assigned on this screen if you selected to map agency codes on the Multi-office Configuration [+Video] screen.

1. Highlight the agency location from the upper section of the screen to apply an agency code to that office.
2. Assign agency codes, and/or manage the Agency Codes list using the available buttons.

   To select multiple codes, hold the **Ctrl** key down and highlight the codes.

-->	Add selected code(s) to the selected location.
<--	Remove selected code(s) from the selected location.
>>	Add all codes to the selected location.
<<	Remove all selected codes from the selected location.

3. Continue assigning codes as needed.
4. Click **Apply** to save your changes before proceeding to the next tab.

To assign users to a specific location

The Users screen enables you to assign users to a specific agency location.

This side-tab is available only when Agency Type has been set to map to a user name (see Multi-office Configuration [+Video] above).

> User profiles must be added to the User List before they can be assigned to a specific agency location. See for detailed instructions.

1. Select a user to assign to a location, and then click **Assign Office**.

   To select multiple users, hold the Ctrl key down and highlight the users.

   > Once a user has been assigned to an office, you may need to activate their **User Permissions** for that office as well. See User Permissions by Office for detailed steps.

   The **Office Assignment by User** dialog opens.

2. Select the Roaming User option from the **Assigned Office** drop-down, and then click **OK**.

   Roaming users are not assigned to any specific office and are prompted to select an office when logging into CMS.

3. Click **Apply** to save your changes before proceeding to the next tab.

User Permissions by Office

HawkSoft CMS enables Multi-Office agencies to set user permissions based on the office associated with each client file. This allows an agency principal to completely block a user from viewing, editing, and reporting on client files that don't belong to that user's office.

User Permissions by Office

Advanced Configuration

This side-tab is available if you selected one of the following Multi-Office Settings:

Each User Maps to an Office Name and Address

Each Office Maps to an Office Name/Each User Maps to an Address

Advanced configuration is used in conjunction with some Multi-Office settings to separate agency documents and settings on a per office basis. For example, letter templates and accounting setup, can be designated to each agency office.

See Multi Office: Advanced Configuration for more information.

When setup is complete, click **OK** to save your changes and close the Agency Information Setup dialog.

Related Topics

Policy/Company Setup: Agent Codes
Folder Locations
User Permissions by Office
User Setup Overview

Configure Agency Users

Manage Agency Profiles and Permissions

Each CMS user must have a user profile that includes permissions set to accommodate his or her job functions. Creating a user profile for each CMS user is essential to the management of the HawkSoft CMS database.

This article is intended to help agency administrators and managers add new user profiles, manage user permissions, and de-activate user profiles when needed.

Manage User Profiles and Permissions

User Licensing

The Seat Management portal enables you to send a request to HawkSoft Billing to change the number of seats on your agency's HawkSoft subscription. Once the request is processed, the number of seats licensed to your agency updates. Changes to the number of seats licensed to your agency will impact the cost of your agency's HawkSoft subscription.

One seat represents one concurrent user accessing HawkSoft CMS at a time. Seats are not assigned to specific users. The number of seats licensed to your agency should be the maximum number of users who need to access HawkSoft at the same time.

Seat Management [+ Video]

Assign Users to a Specific Office

This topic is intended for agencies with multiple offices and includes instructions for assigning users to a specific office.

Assign Users to a Specific Office

General Agency Configuration

The General Configuration dialog enables you to configure settings for a wide range of CMS functions that your agency performs daily. Taking the time to make sure these settings support your workflow can increase efficiency, accuracy, and usability.

General Settings

The General Settings screen enables you to determine default behavior for your agency preferences and workflows. These settings apply to all users in your agency.

General Settings

Required Fields

As an agency administrator, there are specific client and policy fields that you will want to make certain your CSRs complete when inserting a new client and/or a new policy. Within your General Configuration settings, you have the option to configure a select group of fields to either present the user with a reminder to complete the information, or force the user to complete the information before saving.

Configuring Required Fields for your agency

Default Suspenses

HawkSoft CMS enables you to set default Suspenses for specific types of transactions. A suspense will automatically be created when the selected actions are performed, but can be modified or removed if needed.

Default Suspenses

Phone Dial-Out Integration

HawkSoft enables you to configure your phone system to integrate with CMS. This integration enables you to place outbound calls from within a client file with the click of a mouse, and to open an inbound caller's client file as soon as you receive a call.

Depending on your provider, different configuration options are available. Most providers enable you to configure both outbound dialing and inbound call screen pops with CMS.

If your provider has configured inbound calls, CMS either opens the client file automatically, or displays a dialog with the option to open the client file.

Phone System Integration

Agency Announcements

HawkSoft CMS enables you to create customized announcements on your Agency's Start Page. You might want to use the Announcement section to display agency news, company goals, and events for your staff.

In addition to text, you can embed images and tables in the Announcement section.

CMS provides a template to help you get started customizing your announcements.

Agency Announcements

HawkSoft Data Sync

HawkSoft Data Sync - formerly called Data Sharing - is the next step in the evolution of HawkSoft’s agency management system. The service mirrors your agency’s database (client and policy data) to HawkSoft’s secure and encrypted cloud servers.

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace. Drip marketing, consumer information portals, and mobile applications are examples of some of the services that will be available.

This article provides steps to enable HawkSoft Data Sync. Once these steps are complete, your agency's data migrates to the HawkSoft Cloud servers. Moving forward, changes to your agency's client files are automatically mirrored to HawkSoft's Cloud servers.

General Settings

The General Settings screen enables you to determine default behavior for your agency preferences and workflows. These settings apply to all users in your agency.

Your initial CMS installation comes with some General Settings already configured.

This article describes each of the settings available and the impact each setting has on the agency. Review the options described below and select settings according to your preferences.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > General Configuration
>
> See Setting User Permissions for more information.

General Settings

1. Click the **Settings** icon, and then select **General Configuration**.

   All the general configuration settings are located on the **General Settings** tab.

2. Configure the **Global Settings** for your agency.

   The following list describes the available Global Settings, and the effect each setting has if selected.

Accounting

Commission Tracking – Enables an agency to reconcile commission transactions and create Commission Paid reports for the producers, and/or for the agency.

Search

Use Agency ID Field – Activates the Agency ID field on the Client Name and Address Information screen, as well as the **Search** dialog.

An Agency ID number can be entered in this field when an agency converts from a different management system.

> For Nationwide customers receiving company downloads, this field contains the ICAR number.

This field can also be used by an Agency as a customizable field, for instance, to keep track of specific types of customers.

CMS View

Launch PDF file with viewer associated with Windows – Launches the PDF viewer associated with Windows when opening or viewing a PDF from CMS.

When left unchecked, PDFs open in the CMS Viewer. The CMS Viewer launches Tracker XChange Viewer software when you open a PDF.

Mask Personally Identifiable Info in Personal/Driver Screens - If selected, the **Masked** button is available at the top of the Client file to provide an extra level of security. You can use this option to mask or unmask the Personally Identifiable Information (PII) on the Personal/Driver screens.

See Masking Personally Identifiable Information (PII) for more information.

Action Menu

Internal Log – Creates documentation when a change is made using the Internal option in the Action menu.

> Regardless of this setting, a log note is always created when any of the following three tasks are performed in CMS: Archiving/Unarchiving a Client File, Archiving/Unarchiving a Policy [+video], and Duplicate/Remarket a Policy.

See Action Menu for more information about the Internal menu options and Creating a Log Note for more information about log notes.

Force Log on Close of Suspense – Requires users to create a log entry to document closing a Suspense.

Launch Action Menu when launching Website – Launches the Action menu for documentation purposes when a user clicks on the website button 

on the main CMS toolbar.

Auto Attach Sent Emails – Attaches email messages to log notes and to the Attachments List in the client file when an email is sent through CMS.

See Email for more information.

Insert

Default Status & Company to Prospect on New Policy – Sets the Policy Status and Company on the General Policy Information screen to *Prospect* when inserting a new policy.

This setting should be set to encourage the use of the Sales Pipeline.

Show Actions to Perform Box on New Policy – Activates the Actions to Perform menu when inserting a new client or policy. The Actions to Perform menu allows users to print a Receipt and ID Card and prompts the user to add or edit Client Misc Info, Cross-Sell/XDates, and Claims during the insertion process.

Force Edit Cross–Sell/XDates Tool to On – Prompts users to add or edit Cross-Sell/XDates information when inserting a client or policy. The Edit Cross-Sell/XDates Tool option is selected by default on the Actions to Perform dialog.

Edit

Uppercase the Name and Address Fields (Client Level Only) – Sets the information entered for a new client in the Name and Address fields to uppercase. It does not affect existing information on existing client files.

Show country list on mailing/physical address fields – Allows users to select a country on mailing and physical address fields available on the Name and Address and General Policy Information dialogs.

Create Change Form on policy changes – Launches the Change Form dialog after any changes are made to a client/policy.

Print

Print disclaimer on policy summaries – Prints a disclaimer on Policy Coverage Summaries. (Recommended)

Print disclaimer on summaries – Prints a disclaimer on client summaries. (Recommended)

Always use State Specific ID-Card if available – Defaults ID cards to print state specific ID cards, if available.

Reports

Reports Use Index – Sets CMS Data Reports to use the client and policy index rather than searching each client file for report data. This speeds up the reporting process, however, if indexes are not up to date, report results may not be accurate. Please see Freshen Indexes [+Video]* for information on how to keep your indexes up to date.

> Report filter options included in the index are listed with an * asterisk on the **Report Generator Filters** dialog. The speed of your report results is improved only when all selected filters are included in the index.

Database Configuration

Terminal Services/Citrix Client – This setting optimizes CMS for agencies with a Terminal Services (TS) or Citrix configuration.

> This setting is automatically selected if installation was optimized for Terminal Services with Remote Users.
>
> For networking options for your agency, see HawkSoft CMS Installation and Network Options .

This setting has the following impact on users:

- Users will not have a copy of CMS installed on their local workstation, unless the **Install HawkSoft CMS program files locally for this Windows user** setting is selected in Computer Specific Settings [+Video].
- Users can only archive, not delete, attachments
- Restricts ability to edit folder location settings
- Some multi-office setup options are disabled

Archive Attachments (Does not delete attachments) – Attachments to a client/policy file are archived instead of deleted. (Recommended)

User Permissions by Office – Gives multi–office agencies the ability to set different user permissions for each office. See User Permissions by Office for more information.

> **Hide Unauthorized Client Files** – Does not allow users to see client files in the Search Box if not authorized.

See Setting User Permissions for more information.

Microsoft Word Integration – Uncheck this option if you do not have Microsoft Word installed on all workstations.

Additional Settings

ID Card Days

Controls the number of days until the ID card expires when creating a temporary ID card in CMS. If the expiration date of the policy term is prior to the default ID card date, CMS prompts the user to use the expiration date of the policy term.

> Enter 0 to use Policy Effective Date and Expiration Date.

Auto Logout

Automatically logs users out of CMS if the program is inactive for a specified amount of time. The default is set to 30 minutes. Any amount of time can be set by using either the drop-down menu or typing a number into the field.

> This option cannot be disabled and is used to help keep client information confidential.

Primary Rater

The primary rater is used to store and retrieve the correct Motor Vehicle Record (MVR) tables. The rater listed in this field must match the rater the agency uses.

Scan Output

Sets the default scan type to PDF or TIF when using the Scan Utility.

PDF Security

Requires a password to modify PDFs created using the Scan Utility or HawkSoft Virtual Printer.

Password – Enter a password to allow PDF modifications only when the correct password is entered.

If the password field is left blank, PDFs will not be editable.

> If the password is left blank, protection cannot be removed from PDF documents created while this setting is in place.

Agency Logo

You can import your agency logo to be included on invoices generated by HawkSoft CMS, ACORD ID cards (other than state specific), and on your agency's CMS Start Page.

> For agencies with multiple offices, only one logo can be imported.

The Agency Logo Importer supports the following graphic formats: PNG, JPEG, GIF, BMP, ICO, WMF and EMF.

For best results, use an image with a resolution of 1150 x 280 pixels.

To add your agency's logo

1. Click the **Import** button next to the Agency Logo field.

   File Explorer opens.

2. Navigate to your agency logo file, and click **Open**.

   The **ID Card Logo Import** dialog opens with your logo displayed.

3. If the logo looks correct, click **Finish**.

> To import logos into your correspondence see: Agency Logo

Show Logo on Start Page

Check this box to include your imported logo on your HawkSoft CMS Start Page.

Contact Information Alerts

Check this box to alert users when client contact information has not been reviewed in "**X**" number of days.

For more information, see Contact Information Alerts.

Policy Snapshot

Check this box to enable the Policy Snapshot feature and to configure how Policy Snapshots are created for policy changes. If left unchecked, Policy Snapshots will not be created when changes are made to a policy.

> A Policy Snapshot can be created from the Internal Action menu without any configuration. See Internal Action menu options for more information.

Select one of the following options from the available drop-down to determine how Policy Snapshots are created for your agency. This setting can be overridden for specific carriers in Policy Company Setup.

Automatically create Policy Snapshot – Each time changes are made to a policy, a Policy Snapshot will automatically be created and attached to the policy.

Do not create Policy Snapshot (unless overridden) – You might want to select this option rather than leaving the main Policy Snapshot option unchecked, if you don't want to create a Policy Snapshot for most policy changes. This option enables you to set an override for specific carriers that you do want to create a Policy Snapshot for. For example, you might want to create a Policy Snapshot only for carriers that don't download policy changes.

Prompt users before creating Policy Snapshot – Each time changes are made to a policy, the user will be prompted with the option to create a Policy Snapshot.

> Prior to v4.9, Policy Snapshot was called Policy History. The Attachments list might contain Policy History documents saved prior to v4.9.

See Policy Snapshot for more information about creating and reviewing Policy Snapshots.

Related Topics

Commission Tracking Overview
Contact Information Alerts
Freshen Indexes [+Video]*
General Policy Information
Log Notes Overview
The HawkSoft Virtual Printer
Scanning Documents
User Permissions by Office

Configuring Required Fields for your agency

As an agency administrator, there are specific client and policy fields that you will want to make certain your CSRs complete when inserting a new client and/or a new policy. Within your General Configuration settings, you have the option to configure a select group of fields to either present the user with a reminder to complete the information, or force the user to complete the information before saving.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

To configure Required Fields

1. Click the **Settings** icon, and then select **General Configuration** from the menu.
2. Select the **Required Fields** side-tab.

   Each field can be configured to trigger a warning if left blank, or can be configured for required entry.

   As noted next to certain fields, some fields are always required by HawkSoft.

3. Use the check boxes next to each field to determine if the fields should be required or if the user should be presented with a warning when the fields are left blank.

Exceptions to Required Field settings:

- **Download**: When a client or policy is created automatically from a download, these settings do not apply.
- **Data Importer**: When a client or policy is created from the Data Importer, these settings do not apply.
- **Carrier or Vendor client file**: These settings do not apply when inserting a Carrier or Vendor client type.
- **Sales Pipeline**: When a policy is in the Sales Pipeline, most of the policy details are not yet determined. If your agency has Required *General Policy Information* fields configured, these settings do not apply.

  The **State**, **Application Type**, and **Line of Business** are required.

4. Click **OK** to save changes and close the General Configuration dialog.

Related Topics

Default Suspenses
General Settings
Policy Data Auditing

Default Suspenses

HawkSoft CMS enables you to set default Suspenses for specific types of transactions. A suspense will automatically be created when the selected actions are performed, but can be modified or removed if needed.

You can set default Suspenses for the following tasks:

- Inserting a policy
- Editing client information that generates a Change Form
- Inserting a claim
- Changing policy status to Prospect or New

Only one Suspense is created per action. When multiple actions are performed during one transaction, the Suspense is assigned using the first applicable suspense trigger, in the order listed above.

Example: If you enter a claim for a client and also update the client's address, the Suspense settings for the Change Form will be used in the log note for this action.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > General Configuration
>
> See Setting User Permissions for more information.

Configuring Default Suspenses

1. Click the **Settings** icon, and then select **General Configuration**.
2. Select the **Default Suspenses** side-tab.

3. Use the drop-down list in the **Suspend To** column to assign the Suspense to a specific user, a CMS role (Agent of Record, Client Producer, etc.), or "Current User".
4. Enter the number of **Days** to delay before the Suspense becomes active. For example, if you want the Suspense to trigger one week after it's created, enter the number 7.

   > Set the number of days to zero (0) to create a Suspense that becomes active immediately.

5. Optional: Use the drop-down list to set a **Priority** for each item.

   By default, all Actions are set to the lowest priority.

6. Optional: Select a **Category** to be assigned for the selected action.

   Categorizing your Suspenses makes it easier to work your Suspenses. Suspenses are organized by Category on the CMS Start Page, and can be filtered by Category on the Suspense List.

   > The available Categories can be customized for your agency. See Customizing Lists for detailed instructions.

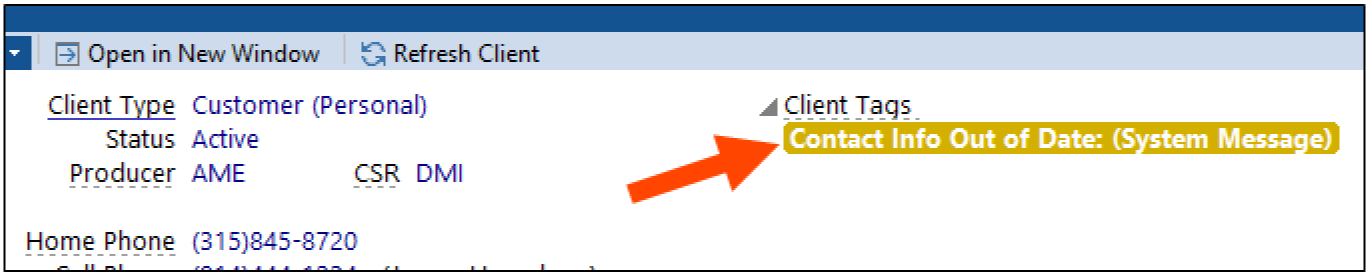
7. Click **OK** to save your changes and exit the General Configuration Settings.

Related Topics

General Settings
Configuring Required Fields for your agency
Suspending a Log Note

Contact Information Alerts

HawkSoft includes the ability to set Contact Information Alerts for client files, enabling you to make sure your clients' contact information stays up-to-date. Contact Information Alerts pop up when a client's contact information has not been changed, or marked as up-to-date, since the number of days specified in General Configuration.



In this topic:

To enable Contact Information Alerts	To mark contact information as up-to-date

To enable Contact Information Alerts

> Required Permissions:
>
> To complete this task, user permissions must be set to include:
>
> **Setup** > **General Configuration**
>
> See Setting User Permissions for more information.

1. Open the **Setup** menu.
2. Select **General Configuration**.
3. Check **Contact Information Alerts** on the General Settings tab.
4. Set the number of days in the "**Alert User if Contact Information is older than** [...] **days**" field.

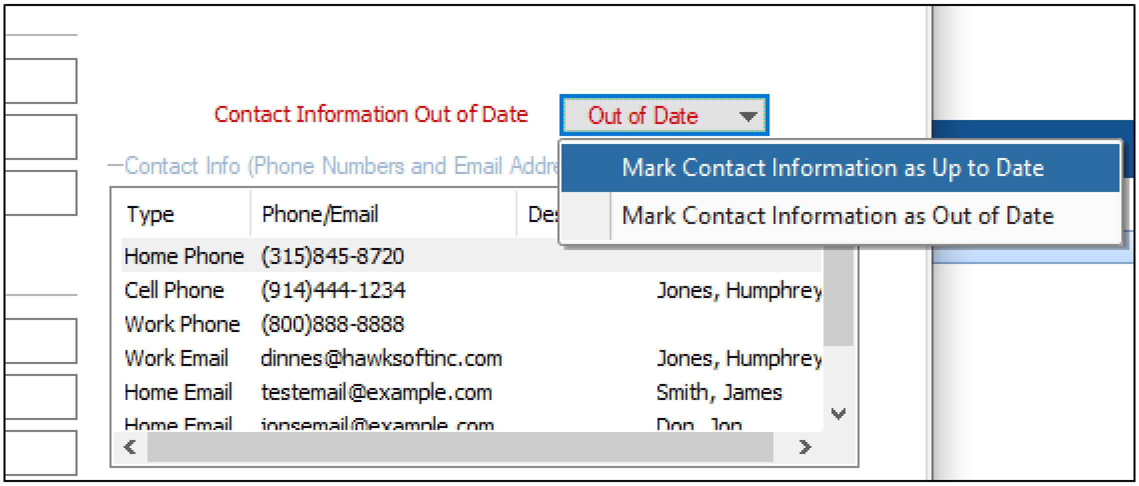
   The alert pops up when the client file is opened, if the contact information has not been marked up-to-date within the set number of days.
5. Click **OK**.

To mark contact information as up-to-date

> Required Permissions:
>
> To complete this task, user permissions must be set to include:
>
> **Client File** > **Action Menu**
>
> See Setting User Permissions for more information.

A client can be marked as up-to-date any time a user opens the Edit Client window.

1. Retrieve the client file.
2. Open the **Action** menu, and select what prompted this action from the first three lists.
3. Click **Change Client** (or **Change Client/Policy** if you have a policy selected).
4. Select **Mark Contact Information as Up to Date** from the **Contact Information** drop-down.



   The value in the drop-down changes to the current date.

5. *Optional:* Make any other changes to the client/policy as needed.
6. Click **Finish**.
7. Click **Finish** again to close the Action Menu.

   The Add Log Entry Comments dialog appears.

8. Add comments as needed, and then click **OK**.

Related Topics

General Settings

Carrier Download Setup Overview

HawkSoft CMS can be configured to accept electronic downloads from participating carriers. CMS attaches these downloads to existing policies and can automatically update policy information according to your Download Rules.

Depending on the carrier, you may need to install download software to take advantage of these features. You will also need to configure CMS to process downloads according to your agency's preferences.

Carriers that Download to CMS

To determine which carriers offer downloads, which lines of business are offered, and the types of downloads available, please see the Carrier Downloads list on our website.

Carriers that Download

Download Managers

All carriers that download use a third-party vendor or their own proprietary download management software to send information to CMS.

- **IVANS** – Most carriers send downloads through the third-party vendor, IVANS Transfer Manager (ITM)™. This software is typically configured during your initial setup with CMS.
- **Other third-party vendors** – Some carriers use one of several other third-party vendors, such as TEAM-UP® or Symbience Clear Path®. Contact the individual vendor to install, configure, and obtain instructions for running the software.
- **Proprietary software** – Some carriers, such as Progressive®, use their own software to download policy transaction files to HawkSoft CMS. Contact the individual carriers to install, configure, and obtain instructions for running the software.

Setting Up a New Carrier for Downloads

HawkSoft CMS contains NAIC and coverage codes. As carriers notify HawkSoft, Inc. with changes to NAIC and coverage codes used in policy downloads, HawkSoft, Inc. automatically updates the CMS database.

Setting Up a New Carrier for Downloads

Carrier Integration

Many carriers permit direct integration with policyholder data, either through IVANS's Transformation Station or similar software. Direct integration allows you to view information, and in some cases, transfer information, without navigating through the carrier's website. These articles provide information on how to set up these integrations.

Carrier Integration Overview

Download Configuration Settings

HawkSoft CMS enables you to configure download rules to determine how carrier downloads are processed and how they are assigned for follow up at your agency. Different rules can be applied to personal and commercial lines downloads, or your agency can apply the same rules to all lines of business.

Download Configuration Settings

Download Rules

HawkSoft CMS enables you to configure download rules to determine how carrier downloads are processed, and how they are assigned for follow-up at your agency.

Download Rules

IVANS Transfer Manager

IVANS Transfer Manager (ITM) can be installed at your agency to enable HawkSoft CMS to receive electronic downloads from a variety of insurance carriers.

IVANS Transfer Manager

Generic Attachment Importer

The Generic Attachment Importer is used to automatically attach files to a HawkSoft CMS client file. The imported files are attached to the correct policy/client file when the policy number is used as the file name.

Generic Attachment Importer

Scheduling Automatic IVANS Transfers

IVANS Transfer Manager™ downloads can be scheduled to run automatically. The computer scheduled for an automatic download must be turned on and logged into the network at the time the task is scheduled to run.

Scheduling Automatic IVANS Transfer Manager Downloads

Create Clients from an Initial Download

As a new agency with HawkSoft CMS, initial downloads can be the primary method for creating the first clients and policies in your CMS database. If your agency doesn't have a prior management system or has chosen not to have HawkSoft convert your prior data, you might want to take advantage of an initial download.

An Initial download, also called initial load, or synchronization (sync) download, is a download sent by a carrier containing all active clients and policies written by your agency under that carrier.

You can configure HawkSoft CMS to automatically create clients and policies from the initial download. However, some manual clean-up is required once initial downloads are processed to ensure that clients and policies contain accurate information, and to correct any erroneous or duplicate clients or policies.

This article covers setting up and processing initial downloads, as well as instructions and tips on cleaning up your database once initial downloads are processed.

Create Clients and Policies from an Initial Download

Carriers that Download

A list of carriers that offer downloads and Real Time integration with HawkSoft CMS is available from the Resources menu on the HawkSoft website. Use this list to quickly find carriers that download into CMS.

Once you find the carrier you are looking for, you can view the following information for each carrier, and create a custom list of instructions for setting up downloads with the carrier as well as any related forms required for the setup:

- Subcarriers and NAIC codes
- Lines of business available for download
- "Other" types of downloads available (e.g. eDocs, Claims, and Memos)
- Real Time Integrations available for each carrier

In this topic:

To access the list of carriers

From CMS

Click the  **Help** icon, and then select **Carrier Download List**.

The Carrier Downloads & Real Time Integration page opens in the HawkSoft website.

From the HawkSoft website

1. Open the HawkSoft website in your browser.
2. Click the **Resources** drop-down menu, and then select **Carrier Downloads**.

   The Download Center Carrier Downloads & Real Time Integration page opens with a list of carriers.

To Search for a carrier

Select a category from the available **Search By** drop-down, and then enter or select an item from the second Search field to quickly find the carrier information you need.

Search categories

Carriers/Subcarriers Name – Enter the name of a carrier or subcarrier in the available Search field.

Commercial Lines – Select a line of business from the available drop-down to view a list of carriers that download that line of business.

Personal Lines – Select a line of business from the available drop-down to view a list of carriers that download that line of business.

Other Downloads – Select a type of download, other than personal or commercial, such as Memos, eDocs, or Claims. Your search results will include carriers that offer this type of download.

Real Time Integrations – Select a type of Real Time Integration in the Search field, such as Billing Inquiry or Policy View. Your search results will include carriers that offer this type of integration.

NAIC – Enter a specific NAIC code to find a matching subcarrier.

Alphabetical Filter

The **letters** on the right-side of the screen are available to limit the list of carriers to include only carrier names that begin with the selected letter.

To create a custom list of carrier download setup instructions

Download instructions are available for each carrier in the list. These instructions will help you configure your agency to receive downloads.

1. Click on the carrier name to open the **Carrier Information** drop-down.

Carrier Information

The Carrier Information displays:

- Subcarriers and NAIC codes
- Lines of business available for download (personal and commercial)
- "Other" types of downloads available (e.g. eDocs, Claims, and Memos)
- Real Time Integrations available for each carrier
- Instructions and forms available for downloading

Lines of Business, Other Downloads, and Real Time Integrations list

Each line of business that this carrier downloads is listed in the **Commercial Lines** or

Personal Lines sections. Additional types of available downloads, such as Direct Bill, or eDocs, is listed below **Other Downloads**. The types of **Real Time Integrations** availabe with the carrier are listed in the far right-hand column.

The current status of the specific type of download is indicated with an icon. Hover over the icon for the status definition.

Download Setup Instructions

The download instructions are included in this section to help you take the appropriate steps to begin receiving downloads for that carrier. These are the instructions that will be included when you add them to your Download Instructions.

---

2. Click the **Add to My Download Setup Instructions** link to select the download instructions and any related forms required for setting up the carrier.

   You will see the number increase next to the **My Download Setup Instructions** (1) in the top right-hand corner of the page.

   The link becomes **Remove from My Download Setup Instructions**. If needed, click the link to remove this carrier's instructions from your list.

3. Continue selecting and adding carriers as needed.
4. Click **My Download Setup Instructions** in the upper right corner to review and download your saved download setup instructions.

   Optional: You can easily remove a selected carrier from the list if needed.

   a. Click the **Remove Items** in the lower left-hand corner.

      A list of your selected carriers opens.

   b. Click **Remove** next to any item(s) as needed, and then click **OK**.

5. Click the **Download** button to download the instructions for each selected carrier as a PDF document, as well as any associated download setup forms to your computer.

See Setting Up a New Carrier for Downloads for additional information.

Related Topics

Carrier Downloads Overview

Carrier Download Setup Overview

Setting Up a New Carrier for Downloads

HawkSoft CMS enables you to configure downloads from any carriers that download policy information.

This article describes the process for setting up a new carrier to download to CMS for your agency.

In this topic:

Determine How the Carrier Downloads	Notify the Carrier You are Ready for Downloads

Determine how the carrier downloads

Contact the carrier to determine how they will send downloads to your agency. Carriers can send downloads to your agency through one or more of the following download methods:

- **IVANS** – Most companies download through the third party vendor, IVANS Transfer Manager (ITM)™. This software is typically configured during your initial setup with CMS.

  See IVANS Transfer Manager for instructions on configuring ITM.

- **Other third-party vendors** – Some carriers use one of several third-party vendors other than IVANS, such as TEAM-UP® or Symbience Clear Path®. Contact the individual vendor to install, configure, and obtain instructions for running the software.
- **Proprietary software** – Some carriers, such as Progressive®, use their own software to download policy transaction files to CMS. Contact the individual carriers to install, configure, and obtain instructions for running the software.

For carriers who download through IVANS

Depending on the carrier you are setting up, you may be asked to provide any or all of the following information:

- IVANS Y-Account number and User ID

  These are located in Download Configuration Settings on the **IVANS Mailbox Settings** tab on the workstation/server that has IVANS Transfer Manager installed.

- IBM Machine Address

  Inform the carrier that this information does not apply to IVANS (CMS) downloads.

- The IVANS mailbox destination

  The IVANS mailbox destination is **ECS**.

- The download destination path

  This will vary, depending upon your network configuration. The destination path for downloads is the Download folder in the shared network HAW directory. It must end with \haw\download.

  Example: Z:\haw\download.

- The Policy Number format

  HawkSoft recommends [PolicyNumber]-[2 digit iteration]. **Example**: 1234567-01

Configure carrier or third party download software

Some carriers, such as Progressive®, use software they develop and maintain for downloading policy transactions to HawkSoft CMS. Other carriers use a third-party vendor, such as Symbience Clear Path®.

HawkSoft, Inc. recommends all third-party applications be installed and run from one local computer only.

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Download Configuration
>
> See Setting User Permissions for more information.

CMS requirements for installing download software

Contact the individual carriers to install, configure, and obtain instructions for running the software.

Install and configure the software on the same workstation that you run downloads from.

All carrier download software must be configured to download policy transaction AL3 files to the “(network drive):\haw\download” directory.

Notify the carrier you are ready for downloads

After you have installed the appropriate software, contact the carrier to let them know you are ready to receive downloads.

Determine types of downloads your agency will receive

When you request a carrier download, the carrier might ask whether you want to receive an initial download, and/or a Direct Bill Commission Statement download.

NAIC coverages and codes

The carrier may send a multi-page document of NAIC and coverage codes to install in CMS.

These NAIC and other carrier specific coverage codes are already installed in CMS. As carriers notify HawkSoft, Inc. with changes to NAIC and coverage codes used in policy downloads, HawkSoft, Inc. updates the CMS database.

If your agency receives a request to add coverage codes to your management system, reply to the carrier to let them know the code installation is complete, or use the following message:

> “HawkSoft, Inc. has installed all NAIC and Coverage codes into the Client Management System for all carriers that have certified them for downloads.”

Related Topics

Process Carrier Downloads
Carrier Downloads Overview
Carrier Download Setup Overview

Carrier Integration Overview

Many carriers permit direct integration with policyholder data, either through IVANS’s Transformation Station or similar software. Direct integration allows you to view information, and in some cases, transfer information, without navigating through the carrier's website. These articles provide information on how to set up these integrations.

Arrowhead Direct Integration

Arrowhead direct integration provides users with the tools to directly transfer information from CMS to the Arrowhead website through the Action menu.

Arrowhead Direct Integration

ClassicPlan Premium Finance Integration

The ClassicPlan Premium Finance integration bridges client and policy premium information from CMS to the ClassicPlan Premium Finance Website.

ClassicPlan Premium Finance Integration

Progressive Insurance Direct Integration

Progressive direct integration enables users to directly transfer information from CMS to the Progressive website through the Action menu.

Progressive Insurance Direct Integration

IVANS Transformation Station Integration

Transformation Station© Integration provides users with a tool to perform policy inquiries, billing inquiries, claims inquiries, and quoting directly with participating carriers.

Transformation Station Integration

Download Configuration Settings

HawkSoft CMS enables you to configure download rules to determine how carrier downloads are processed and how they are assigned for follow up at your agency. Different rules can be applied to personal and commercial lines downloads, or your agency can apply the same rules to all lines of business.

This article explains how to determine if the download rules apply to both personal and commercial lines of business, or if your agency applies different rules for each. By default, CMS applies one set of rules to both personal and commercial. Your agency may want to set different rules if some agents specialize in commercial lines and others only do personal lines.

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Download Configuration
>
> See Setting User Permissions for more information.

To configure download settings

1. Click the **Settings** icon, and then select **Download Configuration**.
2. Select the **Settings** side-tab to determine the way CMS handles documents downloaded from carriers.

   Use Separate Rules for Personal and Commercial Lines

   By default this check box is unchecked, and only one **Download Rules** tab appears on the left of the dialog.

   - To configure download rules for Personal and Commercial lines separately, check this box.

     A confirmation message appears. Saving this setting will also save any changes you may have made on other tabs in this dialog.

     The **Download Rules** side-tab is replaced by two side-tabs: **Personal Download Rules** and **Commercial Download Rules**. The available options are the same for each, but you can now configure those rules specifically for the way your agency processes these different lines of business.

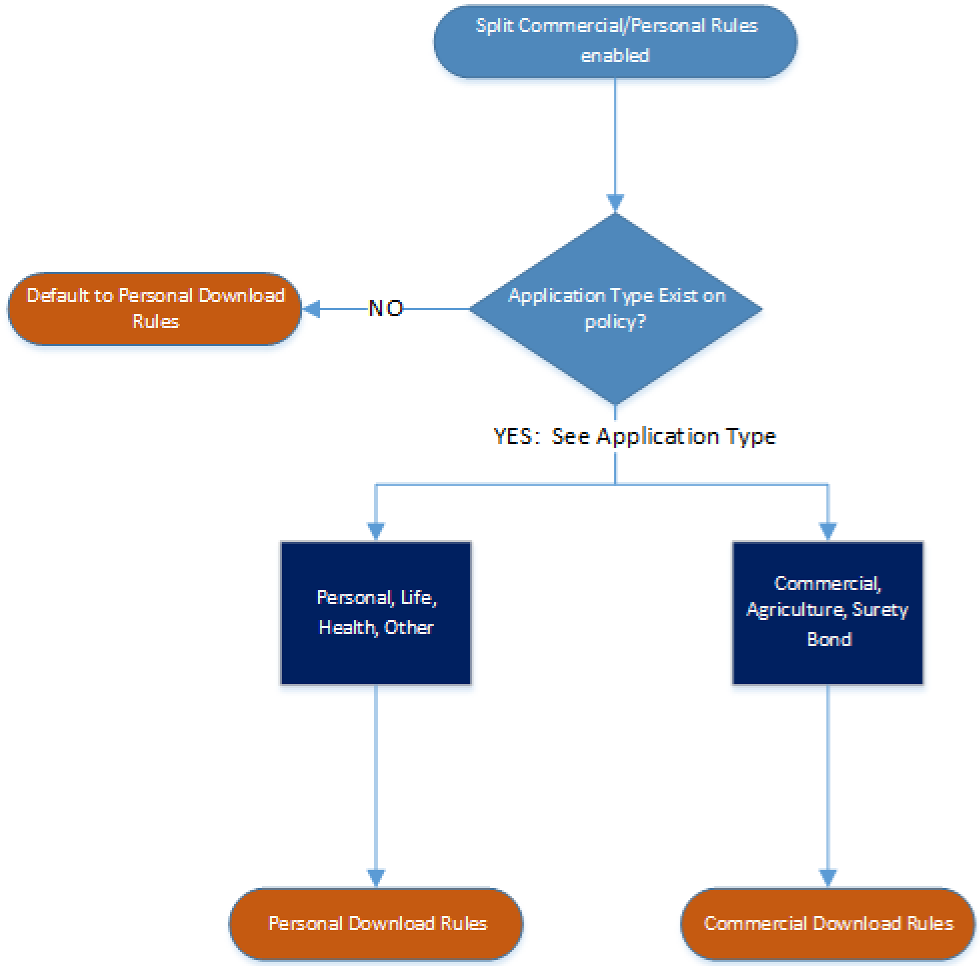
   - Uncheck to reset CMS so that it uses the same download rules for both lines of business.

     The **Download Configuration Options** task menu opens.

     Choose whether to **Use Personal Download Rules** or **Use Commercial Download Rules**.

     > The rule set you do not select will be deleted from CMS.

   See Download Rules for a description of the settings on the Personal and Commercial Download Rules screens.



Auto Create Unfound Policies

Select this option to create new policies in CMS when an initial load includes policies not found.

This setting is usually unchecked unless an initial load is expected. It should be turned off after the initial load has been received.

Initial load

An initial load is the first download from a carrier.

When a carrier sends an initial load, they typically send the last transaction on the policy for every policy you have with them (varies per carrier).

When processing downloads from an initial load, CMS looks for a matching policy number or a client file containing all of the following information:

• Client Name • Address • City	• State • Zip Code

> Some carriers may send an initial load as a Synchronization, in which case the rules set under Synchronization apply.

> For Nationwide downloads, if policies don't match based on the criteria listed above, the ICAR number stored in the Agency ID field is used to match policies.

Download Rules

HawkSoft CMS enables you to configure download rules to determine how carrier downloads are processed, and how they are assigned for follow-up at your agency.

Download Rules are set through the **Download Rules** side-tab in the Download Configuration menu. You can also configure CMS to use two separate sets of Download Rules: one for personal lines downloads, and one for commercial downloads. If you have this setting enabled, you will see the **Personal Download Rules** and **Commercial Download Rules** side-tabs .

See Download Configuration Settings for more information on enabling separate rules for personal and commercial lines.

This article describes Download Rules which are applicable to all downloads, as well as specific rules for certain policy download transaction types.

See Process Carrier Downloads and Download Reports for a description of types of downloads and details for reviewing your downloads.

Why configure Download Rules?

By setting specific rules for specific types of downloads, you can automate how the downloads are processed when your agency's downloads are run each day. For example, you might want all cancellations to be reviewed by a specific user before the policy is changed in HawkSoft. You might want all New Business downloads to automatically update the policy in HawkSoft, while also creating a Suspense for a specific user to take additional action on those new business downloads. You can save your agency time by automating how each download type is processed.

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Download Configuration
>
> See Setting User Permissions for more information.

How do I get here?

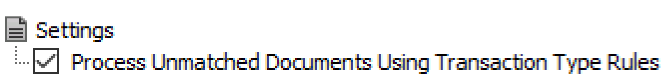
1. Click the **Settings** icon, and then select **Download Configuration**.
2. Select the **Download Rules** tab.

> Depending on previous configuration settings, you may see two Download Rules tabs, one for **Personal lines** and one for **Commercial lines**. The options described below apply to both. See Download Configuration Settings for more information on using separate rules for personal and commercial lines.

General rules that apply to all downloads

The following rules apply to all download types in conjunction with specific rules for specific types of downloads.

Settings

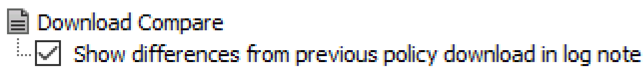


When checked, CMS applies the download rules, described below, when users manually process documents in the Unmatched Documents Inbox.

There is an option in the Unmatched Documents Inbox to unapply this setting, if needed.

Learn more about the Unmatched Documents Inbox.

Download Compare

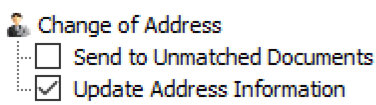


As downloads are processed, a log note is created.

With the Download Compare setting selected, the log note will include a summary of differences between the new download and the previous download.

Learn more about Comparing Downloads and Policy Snapshots.

Change of Address



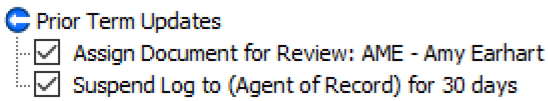
When a download comes in with a client address that doesn't match the address on the client's file, one of the following rules can apply:

Send to Unmatched Documents – When checked, and the address in the downloaded item *does not exactly match* the address found on the client file, the download is sent to the Unmatched Documents Inbox for manual processing.

Update Address Information – When checked, the address information in the client file is updated to match the address information in the download and the file is not sent to Processing Unmatched Documents.

If no change of address rule has been set, CMS matches incoming downloads by policy number only, and downloads will not update clients' addresses.

Prior Term Updates



This rule is applied in conjunction with specific rules assigned to specific download types, listed below (e.g. Renewals, Endorsements, Claims, etc).

> Download types such as billing notices or policy change quotes follow the **All other transaction types** setting.

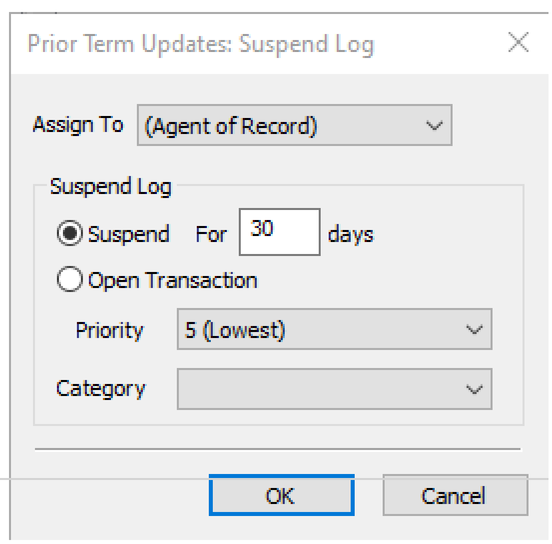
The Prior Term Updates rule overrides specific download type rules when the download impacts the prior term of the policy instead of the current term.

When a download comes in for the prior term, one or both of the following rules can override the specific download type rule:

Assign Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user. The user can then review the download and the updated policy.

Suspend Log to (Agent of Record) for 30 days – When checked, logs created because of an updated policy during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.

3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.

4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

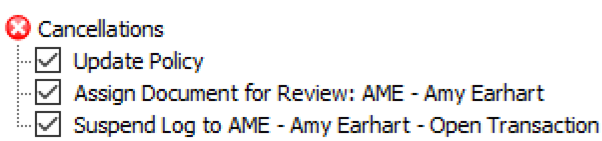
Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Specific rules for specific download types

Cancellations



Any of the following rules can apply to a downloaded policy cancellation:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

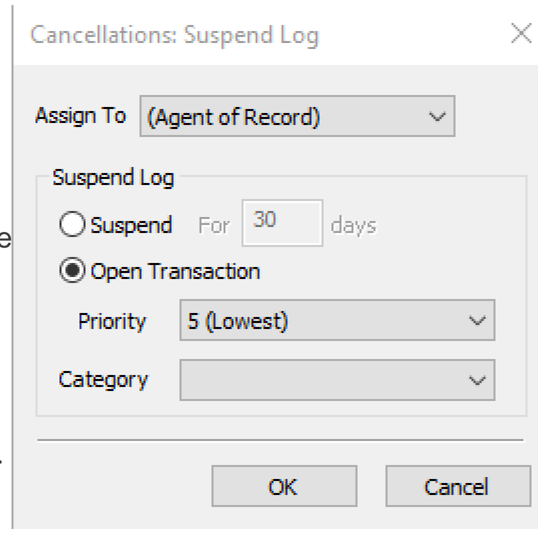
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded cancellation file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

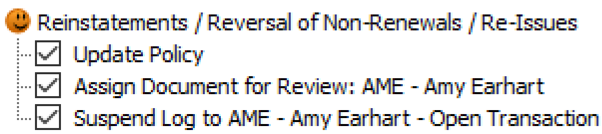
   The available Categories can be customized for your agency. See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Reinstatements/Reversal of Non-Renewals/Re-Issues



Any of the following rules can apply to a downloaded reinstatement or reversal:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

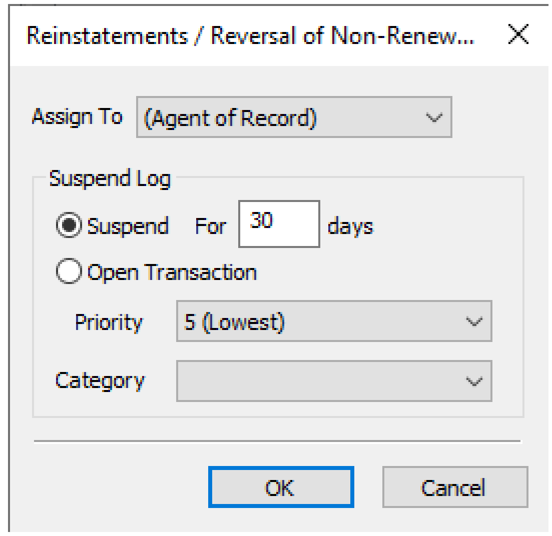
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

> If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

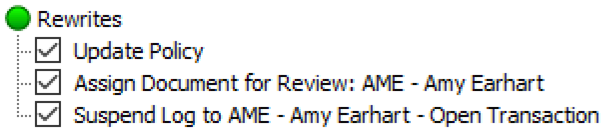
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Rewrites



Any of the following rules can apply to a downloaded rewritten policy:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

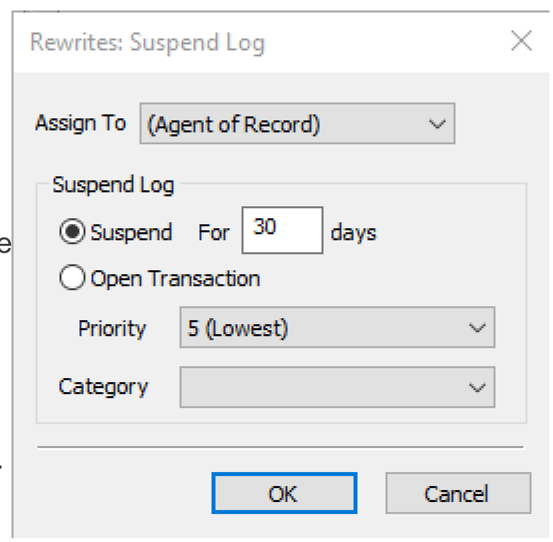
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

> If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded rewritten file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

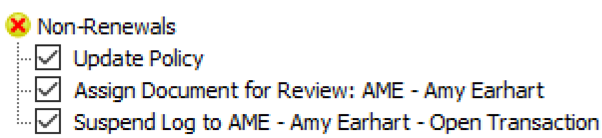
> The available Categories can be customized for your agency.
> See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Non-Renewals



Any of the following rules can apply to a downloaded non-renewal policy:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

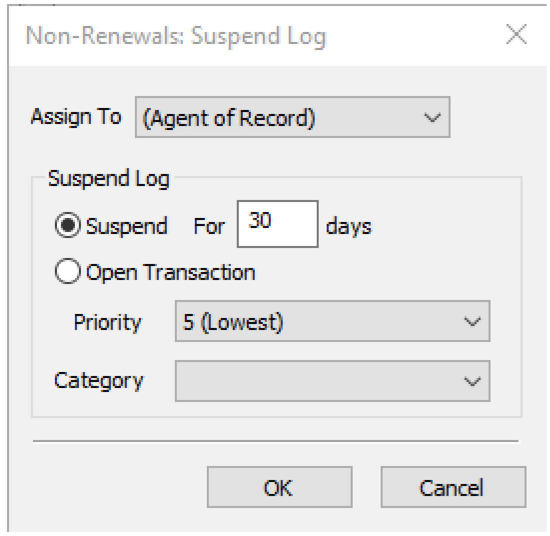
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

> If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded non-renewal file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

    This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

    Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

    Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

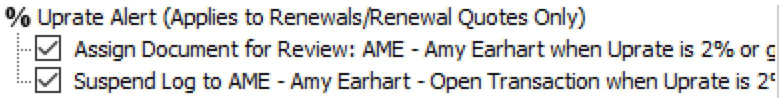
> The available Categories can be customized for your agency.
> See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Uprate Alerts for Renewals



The Uprate Alert calculates the difference between the policy's Current Rate, which is found on the GPI screen in the client file, and the renewal premium referenced in the download. If the difference is greater than the agency-determined threshold, the Renewal or Renewal Quote download will create a Suspense, and/or send a copy to Documents for Review, depending on your settings.

If there are no previous downloads to compare to, the alert is not triggered and a Suspense or Document for Review item is not created.

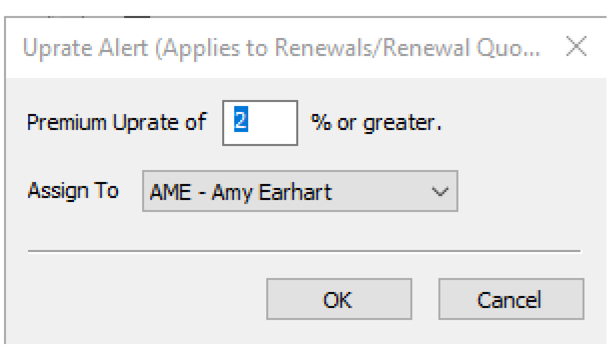
> Uprate Alerts only apply to Renewal or Renewal Quote downloads. For instance, an Endorsement download which raises the premium will not trigger your Uprate Alert download rules (but will still trigger your Endorsement download rules).

Configuring Uprate Alert

Any of the following rules can apply to a downloaded uprate alert:

To **Assign Documents for Review**

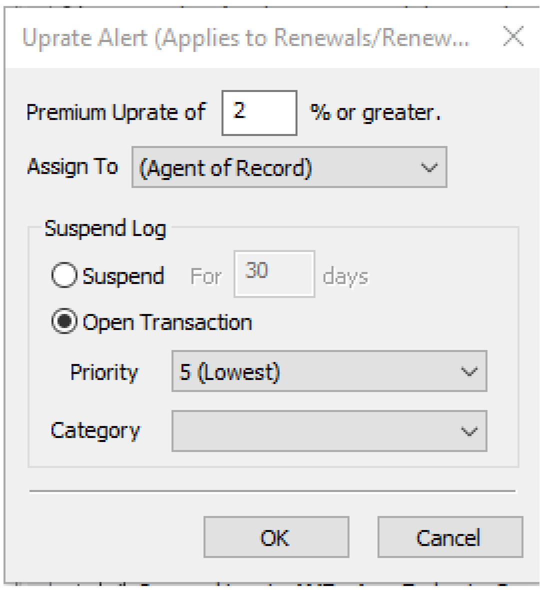
1. Enter the percentage of increase in the **Premium Uprate Of** field that will trigger the uprate alert.
2. Select a user from the **Assign To** drop-down list.
3. Click **OK**.



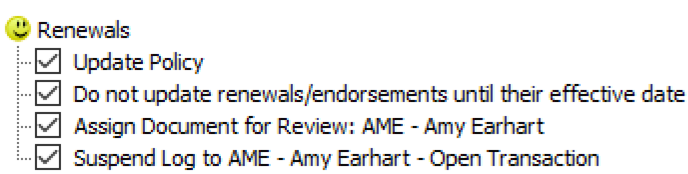
To **Suspend Log**.

1. Enter the percentage of increase in the **Premium Uprate Of** field that will trigger the uprate alert.
2. Select a CMS user from the **Assign To** drop-down list.
3. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
4. Select a **Priority** from the drop-down list.



Renewals



Any of the following rules can apply to a downloaded policy renewal:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Do not update renewals/endorsements until their effective date – *Applies to Renewals only*. Select to postpone the policy update until the effective renewal date. On the effective date of the Renewal, the Renewal download will be processed with other downloads processed by the agency.

If this setting is enabled, Renewals will download and attach to the policy, and the policy Status will be changed to Renewal (Pending). However, the policy will not be updated until the *effective date* of the renewal. When the Renewal processes, an additional log note is created and a line item appears on the Download Report with "Policy Updated" as the Transaction Type.

If a policy is canceled and the Pending Renewal is not processed, a log note is added: *"Pending Renewal was not processed because policy is currently canceled."*

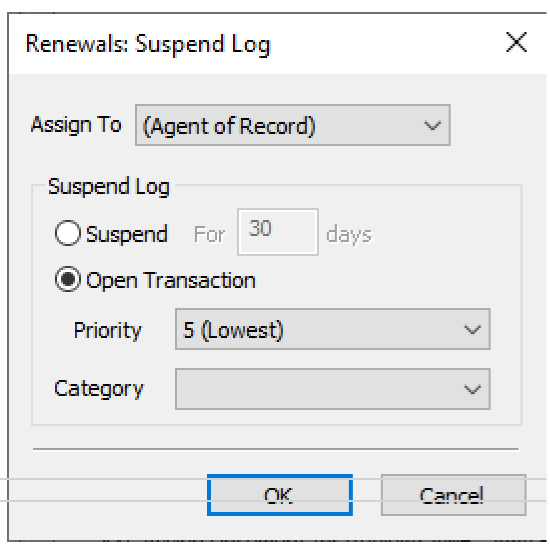
Assign Document for Review – When checked, CMS sends the downloaded renewal file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend

1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.



3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.

4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

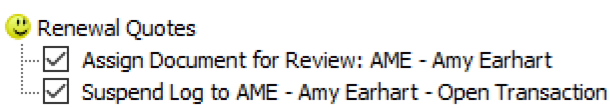
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Renewal Quotes



Any of the following rules can apply to a downloaded renewal quote:

Assign Document for Review – When checked, CMS sends the downloaded renewal quote to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend

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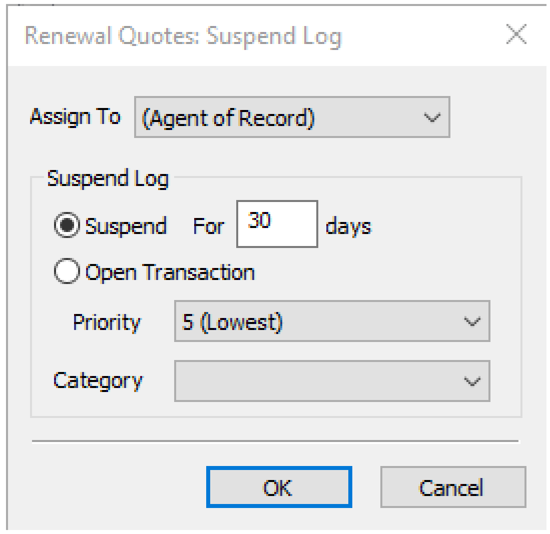
1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.



3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.

4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

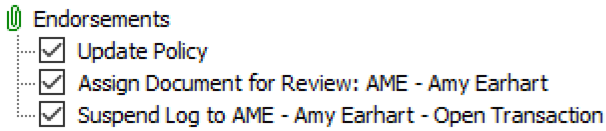
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Endorsements



Any of the following rules can apply to a downloaded policy endorsement:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

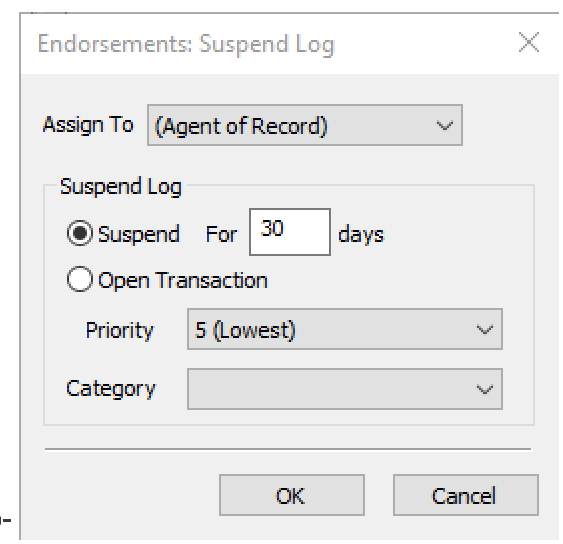
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

> If the policy is not updated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded cancellation file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

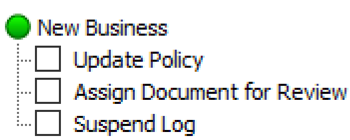
> The available Categories can be customized for your agency.
> See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

New Business



Any of the following rules can apply to a new business download:

Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

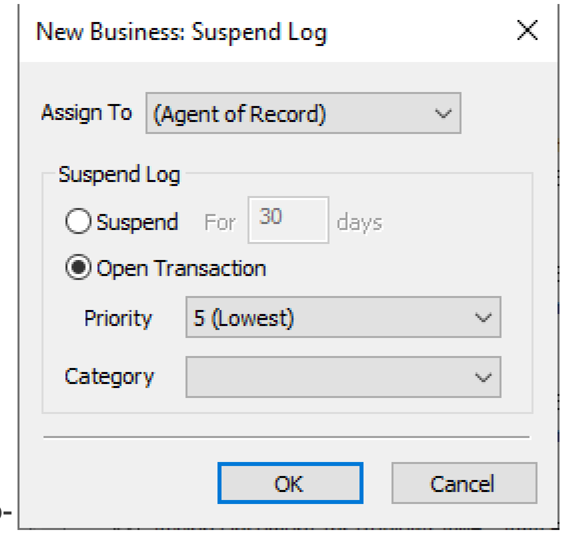
If this setting is left unchecked, CMS auto-attaches the download to the matching policy, without updating the policy.

> If the new client/policy is not createdupdated, It is important to assign the download to be reviewed from a user's Documents for Review or Suspense list.

Assign Document for Review – When checked, CMS sends the downloaded new business cancellation file to the Documents for Review list of the selected user.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

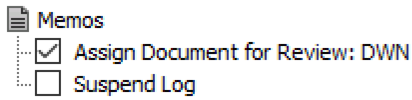
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Memos



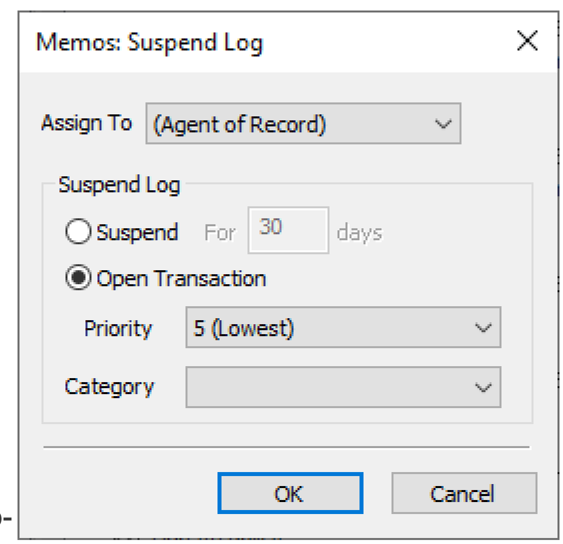
Most memos are sent to the Unmatched Document Inbox, however, if the memo contains a policy number that CMS can match, the memos are attached to the policy and follow the selected rules.

Choose from the following settings to apply when a matching policy is found:

Assign Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user. Download types not specifically listed in Download Configuration follow the **All other transaction types** setting.

Suspend Log – When checked, logs created during the download process are automatically suspended to the selected user. See below for instructions.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

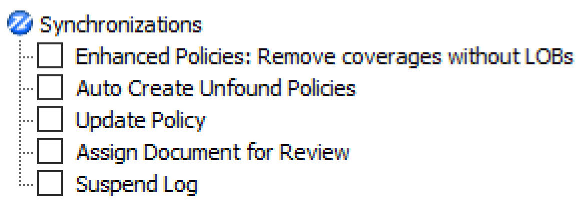
> The available Categories can be customized for your agency.
> See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Synchronizations



Synchronization files are sent from the insurance carrier upon request and when starting downloads with each carrier. When the download is a synchronization and not a specific download type, client and policy information are updated. An agency may request a synchronization from a carrier to ensure the book of business in CMS is up to date with the carrier.

Choose from the following settings to apply when synchronized files are received:

Enhanced Policies (Remove coverages without LOBs) – If checked, any coverages listed on the policy without a line of business will be removed.

Auto Create Unfound Policies – Select to create a new client/policy from the download file when a policy is not found in CMS during a synchronization download. When processing downloads, CMS looks for a matching policy number or a client file containing all of the following information:

HawkSoft strongly recommends leaving Auto Create Unfound Policies disabled unless your agency is performing an "initial load", or downloading your book of business into HawkSoft for the first time. For more information, see the Initial Downloads Overview video.

- Client Name (First and Last Name)

  (Suffix is excluded from match)
- Address
- City
- State
- Zip Code

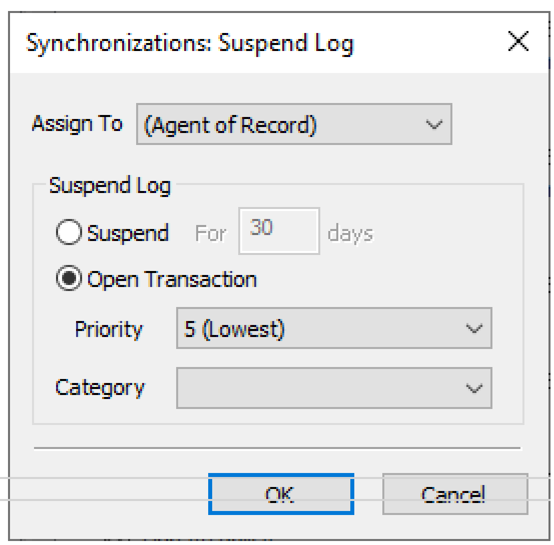
Update Policy – When checked, CMS updates the matching policy found in CMS with the information from the download and creates a log note on the policy with download information.

When not checked, CMS auto-attaches the download to the matching policy, without updating the policy.

Assign Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user. Download types not specifically listed in the Download Configuration will follow the **All other transaction types** setting.

Suspend Log – When checked, logs created during the download process are automatically suspended to the user specified or the agent of record on the policy.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.

3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.

4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

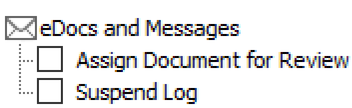
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

eDocs and Messages

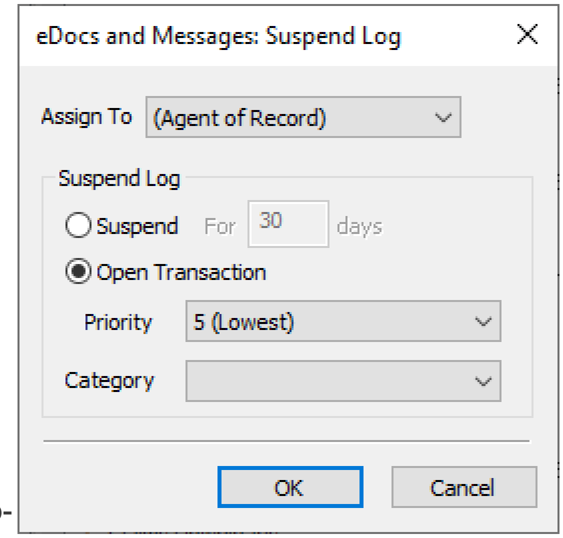


Assign to Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user.

Sending EDocs to the Documents for Review list allows you to prioritize and take action on important carrier notifications such as late payments or underwriting questions.

Suspend Log – When checked, logs created during the download process are automatically suspended to the user specified.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

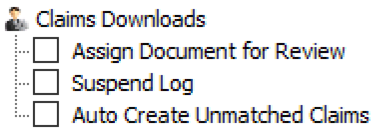
   > The available Categories can be customized for your agency.
   > See Customizing Lists for detailed instructions.

Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Claims Downloads

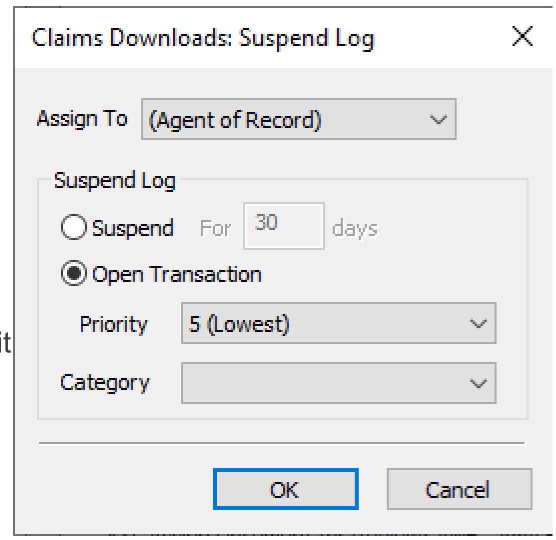


Assign to Document for Review – When checked, CMS sends the downloaded file to the Documents for Review list of the selected user.

Sending Claims to the Documents for Review list allows you to prioritize and take action on important carrier notifications such as adjuster information or claim payments.

Suspend Log – When checked, logs created during the download process are automatically suspended to the user specified.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

> The available Categories can be customized for your agency. See Customizing Lists for detailed instructions.

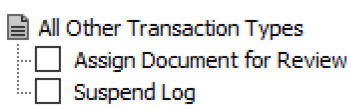
Suspense on a package download

When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Auto Create Unmatched Claims – When checked, CMS creates a new claim on the matching policy with the information from the Claim download when the download does not match to an existing claim on the policy. A log note is created on the policy with download information.

All other Transaction Types

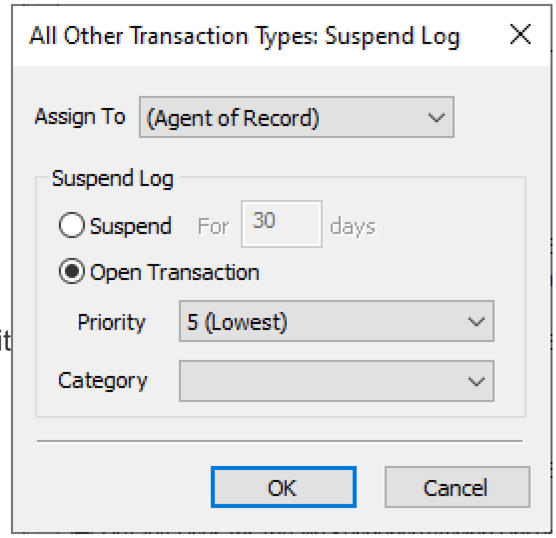


If a download arrives that doesn't fall into any of the other transaction types listed above, it will fall into this category. Choose how you would like to be notified that the download has arrived. Items that fall into this category might be Billing Notices, Policy Change Quotes, etc.

Assign to Document for Review – Assign a user to receive Document for Review items when a user is invalid and is assigned to receive these items from downloads.

Suspend Log – Assign a user to receive Suspenses when a user is invalid and is assigned to receive Suspenses from downloads. See below for instructions.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

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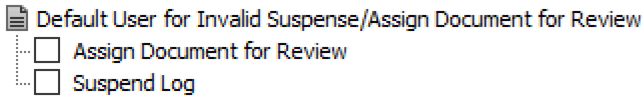
When a package download is processed, CMS creates a separate download for the lines of business that belong in a Home or Auto policy type. In these cases, the Suspense will be applied to only one line of business in the download file, so that the same suspense isn't created for multiple policies.

For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

Default User for Invalid Suspense/Document for Review Assignment



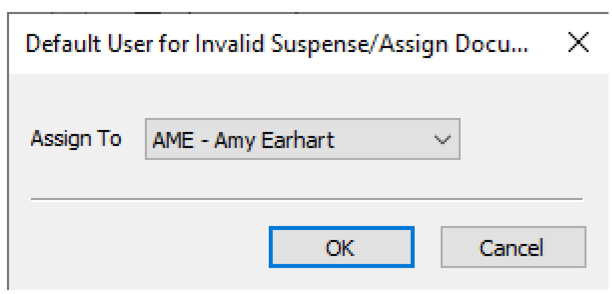
Use this setting to determine who should receive notifications when an invalid user (a user no longer on the User List) is assigned to receive download notifications via a Suspense or when an item will be added to their Documents for Review.

An agency may want to set a default user in case an agent leaves the agency and the agent is removed or made inactive in the User List.

Assign to Document for Review – Assign a user to receive Documents for Review items when the user currently assigned to receive the download is invalid.

Suspend Log – Assign a user to receive Suspenses when the user currently assigned to receive the Suspense for a download is invalid.

How to suspend



1. Select a CMS user from the **Assign To** drop-down list.
2. Select **Suspend** or **Open Transaction**.

   This is the date the item is due. If the date is left blank, it is classified as an Open Transaction, meaning the item appears on the Suspense list immediately.
3. Optional: Select a **Priority** from the drop-down list.

   Users can sort Suspenses by Priority on the Suspense list.
4. Optional: Select a **Category** from the drop-down list.

   Suspenses are sorted by Category on the Start Page and users can also filter their Suspense list by Category.

The available Categories can be customized for your agency. See Customizing Lists for detailed instructions.

Suspense on a package download

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For example: A downloaded package policy contains a General Liability, Commercial Property, and a Business Auto line of business. CMS will create a separate download file for the Business Auto and the Suspense will be created for the policy that contains the General Liability and Commercial property lines of business.

IVANS Transfer Manager

IVANS Transfer Manager (ITM) can be installed at your agency to enable HawkSoft CMS to receive electronic downloads from a variety of insurance carriers.

Before installing IVANS Transfer Manager, your agency will need an IVANS mailbox. The mailbox enables you to receive multiple carrier downloads through a single portal. This eliminates the need to use a separate portal for every carrier you do business with. SeeIVANS Transfer Manager below.

When launched, ITM retrieves carrier downloads from your agency's IVANS mailbox so that CMS can process the downloaded files.

ITM is designed to run from one workstation only. Attempting to run IVANS from multiple workstations will cause a disruption in service.

If you need to install IVANS on a different computer, you must uninstall it from its current workstation.

1. Open **Programs and Features** from the Windows Control Panel.
2. Right-click on IVANS Transfer Manager, and then select **Uninstall**.

Once installation is complete, contact HawkSoft Support to reset the IVANS Transfer Manager security authorization.

In this topic:

This task is typically performed by an Owner/Administrator or Manager.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Download Configuration

See Setting User Permissions for more information.

IVANS Mailbox

In order to get a mailbox set up with IVANS, you must get a carrier to initially "sponsor" a mailbox for you. Agencies typically contact the carrier with whom they do the most business, and ask them to sponsor an IVANS mailbox.

The carrier contacts IVANS and requests the mailbox.

IVANS or the carrier will then email an invitation to you to register for IVANS Exchange and create a mailbox password.

You must click the link in the invitation email and complete the account registration process within 7 days. If the link expires after 7 days, HawkSoft or IVANS will need to resend the invitation.

Once you complete registration and create a mailbox password for IVANS, it is then up to you to provide all of your other downloading carriers with your IVANS mailbox address.

Internal: In the HawkSoft Live Database, next to **Account #**, The IVANS **Y Account** number is listed to the left of the **User ID** number.

Example: YAccount/UserID

Downloading and installing IVANS Transfer Manager

1. Click: https://-download.hawksoft.com/download/ivans/IVANSTMNET4.1.0.exe

   Once the download is finished, the **View Downloads - Internet Explorer** window opens.

2. Click **Run** to open the installer..

   The IVANS Transfer Manager install wizard opens.

3. Click Next on the installer.
4. Click **Yes** to agree on the IVANS License Agreement.

   IVANS Transfer Manager begins installing, and displays a message that IVANS has been installed once complete.

5. Click **Yes** to close the installer.

   IVANS Transfer Manager is now installed to your computer.

Configuring IVANS Mailbox settings

1. Open CMS, and then click the Settings icon.
2. Select **Download Configuration**.
3. Click the **IVANS Mailbox Settings** tab.

   The **Path** is prefilled with the path where ITM was installed, and shows the currently installed **Version**.

   > If your Transfer Manager is out of date, a message appears informing you that your version is unsupported. Click the message to update the Transfer Manager.

   > The IVANS tab is available only if IVANS has been correctly installed.
   >
   > If your agency needs to set up more than one Y-Account, contact HawkSoft Product Support for assistance.

4. Click Add to add your IVANS mailbox.
5. Enter your **Y-Account**, **User ID**, and **Password** you received from IVANS.
6. If you have made changes to this screen, click the **Update IVANS Mailboxes** button to update your local installation of Transfer Manager.

   If successful, a "Transfer Manager Updated!" message appears.

7. Click **OK** to dismiss the confirmation message.
8. Optional: Click the **Support** button to view the most recent log report.

   The log report includes the date and time your company downloads were last run, the number of records processed, and other information that might be helpful for troubleshooting.

   a. Optional: Click **Send to HawkSoft Support** to send the log to the Support team, if you are having issues with your download.

      > For troubleshooting, HawkSoft Support may need to use the **Launch IVANS Transfer Manager** button to review

> the settings in IVANS Transfer Manager.

   b. Close the Support window when done.

9. Click **OK** to close the IVANS Mailbox Settings dialog.

Change existing IVANS mailbox password

To change your IVANS password, you will need to change it on the IVANS website, and in your CMS Download Configuration Setup as well.

IVANS website

1. Log into IVANS Exchange.
2. Click the menu in the upper right-hand corner, and then select **Agency Profile**.
3. Select the **Mailbox Setup** tab, and then click on **Password** below the Actions header.
4. Click **Accept** to agree to take the necessary steps of updating Transfer Manager in HawkSoft CMS with the new password.
5. Enter your **New Password**, and then enter it again to **Confirm**.
6. Follow the steps below to update this password for IVANS Transfer Manager in CMS.

CMS Download Configuration

The IVANS password must be updated from the computer that runs the IVANS downloads.

1. Open CMS, and then click the **Settings** icon.
2. Select **Download Configuration**.
3. Select the **IVANS Mailbox Settings** side-tab.

4. Select the relevant mailbox, and then click **Edit**.
5. Update the **Password** that you entered on the IVANS Exchange, and then click **OK**.
6. Click the **Update IVANS Mailboxes** button.

   A confirmation appears.
7. Click **OK**.

IVANS Transfer Manager is now installed and your computer is ready to receive downloads.

See Scheduling Automatic IVANS Transfer Manager Downloads for instructions to set up IVANS to run automatically.

Related Topics

Download Troubleshooting
Process Carrier Downloads
Scheduling Automatic IVANS Transfer Manager Downloads

Scheduling Automatic IVANS Transfer Manager Downloads

IVANS Transfer Manager downloads can be scheduled to run automatically. The computer with IVANS Transfer Manager installed must be turned on and logged into the network at the time the task is scheduled to run.

> If you use any third-party download software for companies such as Progressive™, Mercury™, etc., ITM must be run after running the third-party software.

See IVANS Transfer Manager for IVANS installation instructions.

In this topic:

Schedule Automatic Downloads in Windows XP	Schedule Automatic Downloads in Windows Vista, Windows 7, Windows 8, or Windows 10

> Required Permissions:
> To perform this task, no specific CMS user permissions are required, however, your local Windows® security settings may need to be set by your network administrator prior to scheduling automatic downloads.
>
> See Setting User Permissions for more information.

> For additonal information and additional options for the Windows Task Scheduler for XP, Win7, and Win8, please reference Microsoft Online Support.

To schedule automatic downloads in Windows Vista, Windows 7, Windows 8, or Windows 10

1. Open the Windows® **Control Panel**, and then click **Administrative Tools** > **Task Scheduler**.
2. Click **Create Task**.

The **Create Task** dialog opens with the **General** tab open.

3. Type *Ivans* in the **Name** field on the **General** tab.
4. Select **Run only when the user is logged on**.
5. Select the **Triggers** tab, and then click **New**.
6. The **Begin the task** drop-down defaults to **On a schedule**.
7. Select **Weekly**, and then set the time when you want the download to run.
8. Select all weekdays (business days), and then click **OK**.
9. Select the **Actions** tab, and then click **New**.
10. For the Program Script, click **Browse**, and then open the `Transman.exe` file.

    This file is typically found in C:\IVANS\TM.NET folder path of the workstation with IVANS Transfer Manager installed.
11. Add **/A** in the **Add arguments (optional)** field.
12. Enter the folder path in the **Start in (optional)** field.

    The path is the same text listed in **Program/script** up to, but not including the program name, `Transman.exe`.
13. Click **OK**.
14. Click the **Settings** tab.
15. Set the **Stop the task if it runs longer than** field to **4 hours**.
16. Click **OK**.

Related Topics

Carrier Downloads Overview
Download Configuration Settings
Download Report
Process Carrier Downloads

Generic Attachment Importer

The Generic Attachment Importer is used to automatically attach files to a HawkSoft CMS client file. An agency may want to use the Generic Attachment Importer to automatically attach files, such as photos of a home or business, directly to the correct policy.

- Imported files are attached to the correct policy/client file when the policy number is used for the file name.
- When the policy number is not used as the file name, CMS sends the file to the Unmatched Documents Inbox for manual processing.

In this topic:

This task is typically performed by an Owner/Administrator or Manager.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Download Configuration

See Setting User Permissions for more information.

Enabling the Generic Attachment Importer

1. Click the **Settings** icon, and then select **Download Configuration**.
2. Click the **Generic Attachment Importer** tab.
3. Check the **Enable Generic Attachment Importer** box.
4. Click **Browse** to select the **Import Path**.

   This is the location of the files to be imported.

   File names must be the same as the policy number of the file they are attached to, with the addition of a unique identifier. The file name format should be: (policy #)=(unique identifier).

   Example, 1234567890=1, and 1234567890=2.

There are two files that both need to be attached to the same policy #1234567890).

5. Enter a **Description**, or select from the drop-down list.

   The description is displayed in the attachment screen when it is attached to the policy during the download/import process.

6. Optional: Select a user name from the **Assign To** drop-down to forward all downloaded items to the selected user for follow-up.

7. Optional: Select **Import files as part of the normal download**.

   - When checked, CMS imports files from the path selected in step 4 when you run a normal download.
   - When unchecked, you must run the Generic Attachment Importer in the Download Utility separately.

Importing files

Required Permissions

To complete this task, user permissions must be set to include:

Utilities:

☑ Perform Downloads

See User Permissions for more information.

Follow the steps below when the Generic Attachment Importer is not part of the normal download process.

1. Click **Taks** from the main CMS menu bar, and then select **Downloads**.
2. Select **Generic Attachment Importer** from the **Choose which downloads to perform** drop-down list, and then click **Finish**.

Related Topics

Process Carrier Downloads

Create Clients and Policies from an Initial Download

As a new agency with HawkSoft CMS, initial downloads can be the primary method for creating the first clients and policies in your CMS database. If your agency doesn't have a prior management system or has chosen not to have HawkSoft convert your prior data, you might want to take advantage of an initial download.

An Initial download, also called initial load, or synchronization (sync) download, is a download sent by a carrier containing all active clients and policies written by your agency under that carrier.

You can configure HawkSoft CMS to automatically create clients and policies from the initial download. However, some manual clean-up is required once initial downloads are processed to ensure that clients and policies contain accurate information, and to correct any erroneous or duplicate clients or policies.

This article covers setting up and processing initial downloads, as well as instructions and tips on cleaning up your database once initial downloads are processed.

> Not all carriers offer initial downloads, and the information contained in the initial downloads varies by carrier. To see which carriers offer initial downloads, see our Carrier Downloads and Real-time Integration webpage.

In this topic:

Before you begin

Before you configure HawkSoft to automatically create your clients and policies, and before you begin processing your initial loads, it's important to understand how the process works in HawkSoft.

How are clients and policies created?

Your initial download automatically creates clients and policies in your HawkSoft database. If this is your first initial download from the carriers, your clients and policies are not in the database yet. Once the clients and policies exist in your database, HawkSoft compares the downloaded client/policy information with any existing files in the database and creates/updates the files.

To prevent creating duplicate files, HawkSoft uses the following matching criteria to update existing clients and policies before creating new files:

Matching Criteria	Match	No Match
Policy Number **AND** Line of Business	Update Client/Policy	Continue to Search for client last name and mailing address
Exact match to the last name (or business name for commercial clients) **AND** mailing address in the download	Create Policy on the Client	Create a new client file with a new policy

Client and policy information not downloaded correctly

Data type	Description	To modify
Company/Program Name	Company doesn't match Policy/Company Setup	Clean up invalid companies
Agent Codes	Prefixes, hyphens, or spaces don't match Policy/Company Setup	Clean up Agent Codes
Duplicate client files	Incorrect address	Clean up duplicate

Data type	Description	To modify
		client files
Policies added to the wrong client files	Two similar client files	Create Clients and Policies from an Initial Download

Client and policy information not downloaded

Data type	Description	To modify
Customer Type	Personal Lines or Commercial Lines	Assign Customer Types
Client Producer	Agent writing client's policies	Assign Client Producers
Policy Agents	The writing or commissioned agent(s)	Create Clients and Policies from an Initial Download

To configure HawkSoft to automatically create clients and policies

Prior to processing your initial download, configure HawkSoft to automatically create clients and policies.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Download Configuration
>
> See Setting User Permissions for more information.

1. Click the Settings icon, and then select **Download Configuration**.
2. From the **Settings** tab, check **Auto Create Unfound Policies**.
3. Click **OK**.

   Auto Create Unfound Policies is now enabled. Any unmatched download will automatically create a new client and/or policy rather than be sent to the Unmatched Documents Inbox.

   > To prevent further duplicate clients and policies, you must turn off Auto Create Unfound Policies from Download Configuration once you finish processing initial downloads from all your carriers.

To process initial downloads

Once Auto Create Unfound Policies is enabled, you can process your initial downloads the same as any other carrier downloads. See Process Carrier Downloads for detailed instructions.

Turn off the Auto Create settings as soon as initial loads are processed

Because of the issues that using Auto-Create Unfound Policies can cause, it is critical that you only use Auto-Create when creating your initial CMS database, and turn it off once you finish processing initial downloads from all your carriers.

To clean up policy data

The fastest way to clean up most invalid policy data is to run reports through Agency Intelligence, and then use Data Replace to fix data on multiple policies all at once.

This section covers how to use Data Replace to fix invalid companies, invalid Agent Codes, and assign Customer Types.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Agency Intelligence
Utilities > Search and Replace/Data Replace

See Setting User Permissions for more information.

Run a backup

You should always run a backup before performing a Data Replace. Once a Data Replace is complete, it cannot be undone.

A new backup is critical if an error is made during the Data Replace process; without one, your agency is at serious risk of major and irreversible data loss.

See Creating Backups for detailed steps.

Clean up invalid companies

Because of the possibility of making unintended changes to your client database, HawkSoft recommends running a CMS backup, and then contacting Product Support for assistance before running Data Replace. Product Support requires written permission from an agency administrator listed on the HawkSoft License Agreement before assisting with a Data Replace.

1. Click **Reports** > **Agency Intelligence** from the CMS Menu Bar.

   Agency Intelligence opens.

2. Select **Policies in Force** under **Policy KPIs** on the left.
3. Change the **Group By** drop-down to **Company**.
4. Click the **Company** column to sort the report by company name, ascending alphabetically.

   To see which companies are invalid, open Policy/Company Setup and compare the companies on the report with the companies in Policy/Company Setup. If a company appears in the report but does not appear in Policy/Company Setup, the company is invalid.

5. Double-click the value in the **Policies** column next to a company that you need to change.

   The **Total Active Policies by Company** report for the company opens.

6. Click **File** > **Data Replace**.

   The Data Replace dialog opens.

7. On the **Auto** tab, open the **Company** drop-down and choose the valid company name.

   Example: For policies with a Company of Nationwide Mutual Ins. Co., choose Nationwide as the valid company name.

8. Open the **Program** drop-down and choose a valid program or writing company, if applicable.

   Example: For policies with a Company of Nationwide Mutual Ins. Co, choose Nationwide Mutual Ins. Co. as the valid program name.

9. Repeat steps 7-8 on the **Boat**, **Home**, and **Commercial / All Other** side tabs.
10. Click **OK** to initiate the Data Replace.
11. Click **Yes** to confirm.

    Once complete, a confirmation dialog opens.

12. Click **OK**.
13. Double-click any row on the report.
14. Verify that the policy's **Company** and **Program** are now correct and valid.
15. Close the **Total Active Policies by Company** report.
16. Return to the **Policies in Force** report.
17. Repeat steps 5-16 until all invalid companies are replaced.
18. Be sure to run Freshen Indexes when you are done replacing data.

Clean up Agent Codes

Because of the possibility of making unintended changes to your client database, HawkSoft recommends running a CMS backup, and then contacting Product Support for assistance before running Data Replace. Product Support requires written permission from an agency administrator listed on the HawkSoft License Agreement before assisting with a Data Replace.

1. Return to the **Policies in Force** report in Agency Intelligence.
2. Change the **Group By** drop-down to **None**.
3. Double-click the number under the **Policies** column.

   A report of all active policies opens in a new tab.

4. From the Reports toolbar, click 

.

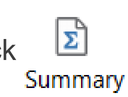
   The **Report Layout** window opens.

5. Click **Add/Edit**.
6. Check **Agent Code** under **General Policy Information**.

   You can add a Policy Base Type column to the report from the Layout menu to see the base type of each policy. The Enhanced Base Type is for Commercial / All Other policies.

7. Optional: Uncheck any unnecessary Report Fields such as **Annual Premium**, **Source**, **Zip**, etc.
8. Click **OK**.
9. Click **Finish**.

   The report refreshes with the columns selected.

10. From the Reports toolbar, click 

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    The **Create Summary** dialog opens.

11. Select **AgentCode**, and then click **OK**.

The **AgentCode Summary of Total Active Policies by None** report opens in a new tab.

> Click the **AgentCode** header in the report to sort the list by Agent Code.

12. Double-click on an Agent Code to be updated.

    A sub-report of all policies with that Agent Code opens.

13. Click **File** > **Data Replace** in the sub-report.

    The **Data Replace** dialog opens.

14. On the **Auto** tab, open the **Agent Code** drop-down and choose the valid code.
15. Continue to select the valid code on the **Boat**, **Home**, and **Commercial / All Other** tabs.
16. Click **OK** to initiate the Data Replace.
17. Click **Yes** to confirm.

    Once complete, a confirmation dialog opens.

18. Click **OK**.
19. Double-click any row on the report.
20. Verify that the policy's **Agent Code** is now correct and valid.
21. Close the sub-report of all policies with that agent code.
22. Return to the **AgentCode Summary of Total Active Policies by None** report.
23. Repeat steps 12-22 until all invalid Agent Codes have been replaced.
24. Be sure to run Freshen Indexes when you are done replacing data.

Clean up duplicate client files

After processing initial downloads, you might search for a client and notice two clients with the same name, but different Customer IDs. This is most likely due to a policy from the initial load that did not exactly match the client file.

HawkSoft Inc. recommends that personal policies and commercial polices for the same client be kept in separate client files.

Required Permissions:
In order to complete this task, user permissions must be set to include:

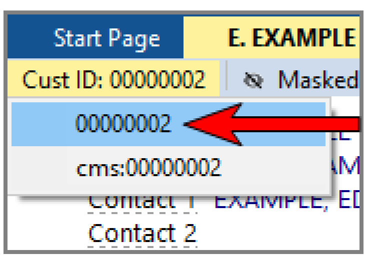
Client File > Action Menu > Change/Correction (Action Menu) > Internal Menu > Internal Correction > Duplicate Policies

See Setting User Permissions for more information.

1. Open both client files in separate tabs.
2. Compare the client files and determine which file to keep.

   Keeping the client file with the most information, specifically correct address and most complete contact information, prevents having to re-enter some data.

3. Navigate to the client file you are *keeping*.
4. Click **Cust ID** in the upper left-hand corner of the selected client file, and then select the ID number to copy to your clipboard.

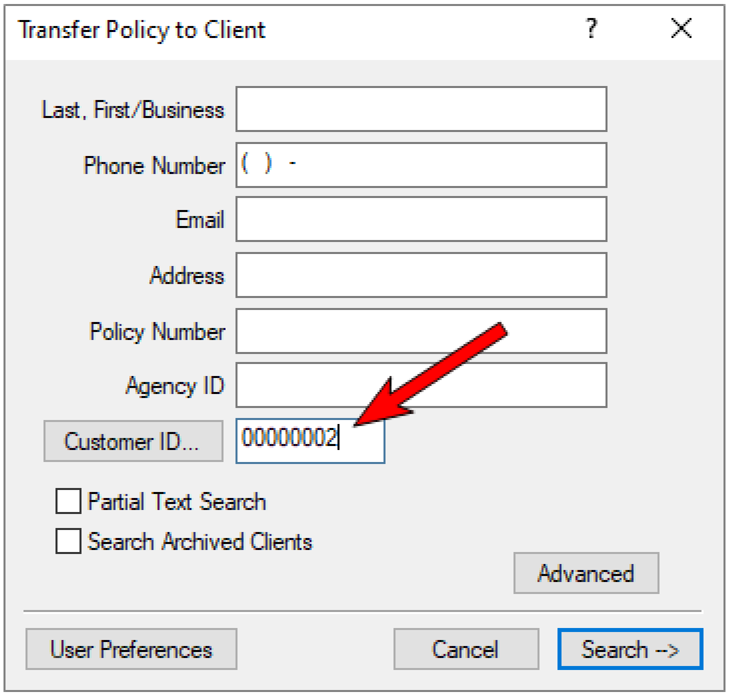
5. Navigate to the client file you are *not* keeping.

   This is the client file you will archive after the merge.

6. Click **Action**.
7. Select **Internal** > **Merge Clients**.

   The **Transfer Policy to Client** dialog opens.

8. Paste in the **Customer ID**, and then click **Search**.



The clients are merged, and a confirmation message appears.

9. Click **Yes** to archive the open client.

   The Add Log Entry Comments dialog opens.

10. Add comments to document the merge, such as "Merged into Client # 2", and then click OK.

Repeat these steps if more duplicates are discovered while searching for a client.

See Merging Client Files for more information.

Clean up policies that have been added to the incorrect client files

After processing initial downloads, you might open a client file and notice an extra policy added to the client file that does not belong there. This can happen if there are family members sharing the same last name and living in the same household, or a client's commercial policies are added to their personal client file (or vice versa).

For example: Larry Lastname has a son named Lucas Lastname living with him. Lucas has his own auto policy in which he is the named insured, but because he shares his father's last name and address, CMS assumes the policy is a new policy for Larry. The reverse could also happen, where Larry's policy ends up on Lucas' client file, depending on which download is processed first.

As another example, Eddie Example has a personal homeowner's policy, but also has a commercial general liability policy because he is a contractor. In this case, Eddie should have two client files, one for his personal policies and one for his commercial policies, but because CMS sees a matching name and address, it assumes the policies belong on the same file.

The following steps can be used to move a policy from one client file to the correct client file. If a second client file doesn't already exist, you can create a new client file, and then move the policy.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Client File > Action Menu > Internal Menu > Archive/Move Policies
>
> See Setting User Permissions for more information.

If a new client file is needed

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> File > Insert Client
>
> See Setting User Permissions for more information.

1. Click **Client** from the CMS Menu Bar, and then select **Insert** > **New Customer**.

   The **Action** menu opens.

2. Select **(No Policy)**.

The **Insert Client Only** dialog opens, with **Name and Address** selected.

3. Click **Add** under **Named Insureds and Personal Profiles**, and then fill in the client name and any additional information, as needed.

> You must add a name, but you can return and add additional information to the Personal Profile at a later date.

4. Click **OK** to return to save your information and return to the **Insert Client Only** dialog.

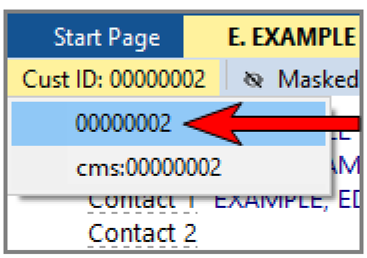
5. Click **Finish**.

   The **Add Log Entry Comments** dialog opens.

6. Click **OK**.

   The new client file is created.

7. Click **Cust ID** in the upper left-hand corner of the new client file, and then select the ID number to copy to your clipboard.



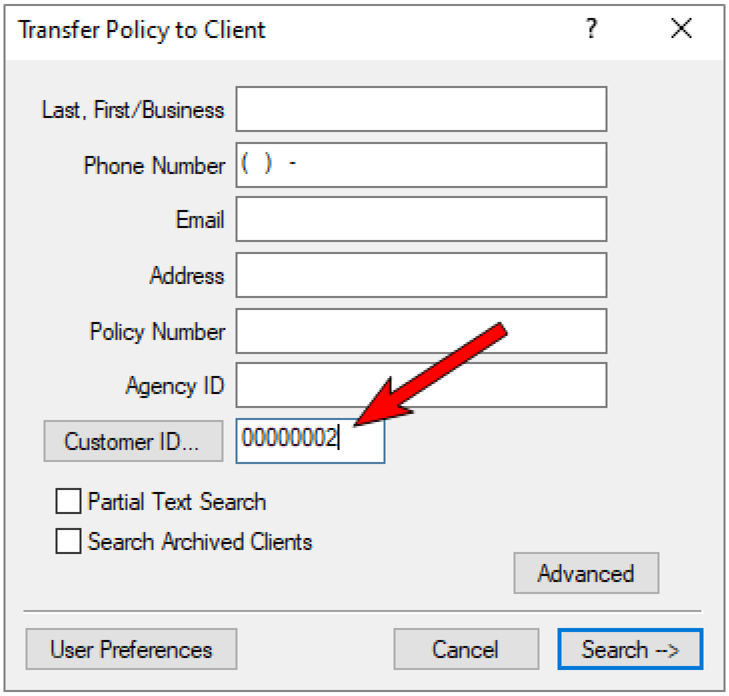
You are now ready to move the policy to the new client file.

Move the policy to the correct client file

1. Open the client file that contains the erroneously placed policy.
2. Select the policy to move.
3. Click **Action** > **Internal** > **Move Policy**.

   The **Transfer Policy to Client** dialog opens.

4. Paste in the **Customer ID**, and then click **Search**.



The policy is transferred, and a confirmation message appears.

5. Click **Yes**.

   Another confirmation message appears.

6. Click **Yes** to archive the policy and corresponding log notes.

   The **Add Log Entry Comments** dialog opens, with the moved policy documented.

7. Click **OK**.

   The policy along with any log notes and attachments is moved to the correct client file, and the old policy is archived.

> You might need to click **Refresh Client** on the new client file to show the policy.

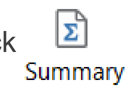
Assign Customer Types

Customer Type is not included in the downloads from the carriers. These steps are intended to help you assign Customer Types to your client files based on the lines of business on the client's policies.

Because of the possibility of making unintended changes to your client database, HawkSoft recommends running a CMS backup, and then contacting Product Support for assistance before running Data Replace. Product Support requires written permission from an agency administrator listed on the HawkSoft License Agreement before assisting with a Data Replace.

1. Return to **Agency Intelligence** > **Policies in Force**.
2. Change the **Group By** drop-down to **None**.
3. Double-click the number under the **Policies** column.

   A report of all active policies opens in a new tab.

4. From the Reports toolbar, click 

.

   The **Create Summary** dialog opens.

5. Select **LOBs**, and then click **OK**.

   The **LOBs Summary of Total Policies** report opens in a new tab.

6. Select all LOBs you want to assign one specific Customer Type, such as 'Personal' or 'Commercial'.
   a. Press and hold the **Ctrl** key and select specific entries.

      OR

      To select a range of line items, select the first item, and then press the Shift key to select the last item to be included in the section.
   b. Right-click any of the selected entries and choose **New Report from Selected Entries**.

   Your selected entries open in a new **LOBs** report.

7. In the new report, click **File** > **Data Replace**.

   The **Data Replace** window opens.

8. Select the **Client** tab.
9. Change the **Customer Type** drop-down to **<Replace>**.

10. Check the box next to the **Customer Type** you need to assign, such as **Personal** or **Commercial**.
11. Click **OK** to initiate the Data Replace.
12. Click **Yes** to confirm.

    Once complete, a confirmation dialog opens.
13. Click **OK**.

    > After running the Data Replace, double-click on a line-item in the finished report to view the client file and policy. **Verify** that the Customer Type is now correct.

14. Close the **LOBs** report and return to the **LOBs Summary of Total Active Policies** report.
15. Repeat steps 6-14 for all LOBS until all clients are assigned a Customer Type.
16. Be sure to run Freshen Indexes when you are done replacing data.

Assign Client Producers

Client Producers are not included in downloads from the carriers. These steps are intended to help you assign Client Producers to your client files.

1. Return to **Agency Intelligence** > **Policies in Force**.
2. Change the **Group By** drop-down to the desired grouping, depending on how your agency assigns producers to clients.

   For example, if your agency assigns producers to clients by LOBs, choose **Line of Business**, or if your agency assigns producers to clients insured by certain carriers, choose **Company**.
3. Double-click the **Policies** count next to the group you want to assign a certain Producer to, such as a certain Company or LOB.

   A report of all policies within that group opens.
4. In the new report, click **File** > **Data Replace**.

   The **Data Replace** window opens.

5. Select the **Client** tab.
6. Select the desired Producer from the **Producer** drop-down.
7. Click **OK** to initiate the Data Replace.
8. Click **Yes** to confirm.

   Once complete, a confirmation dialog opens.
9. Click **OK**.

   > After running the Data Replace, double-click on a line-item in the finished report to view the client file and policy. **Verify** that the Producer is now correct.
10. Repeat steps 1-9 until all active clients are assigned a Producer.

Assign Policy Agents

Policy Agents are not included in downloads from the carriers. These steps are intended to help you assign Agents to your client files.

1. Return to **Agency Intelligence** > **Policies in Force**.
2. Change the **Group By** drop-down to the desired grouping, depending on how your agency assigns agents to policies.

   For example, if your agency assigns agents to policies by LOBs, choose **Line of Business**, or if your agency assigns agents to policies insured by certain carriers, choose **Company**.
3. Double-click the **Policies** count next to the group you want to assign a certain Agent to, such as a certain Company or LOB.

   A report of all policies within that group opens.
4. In the new report, click **File** > **Data Replace**.

   The **Data Replace** window opens.
5. Select the **Auto** tab.
6. Select the desired Agent from the **Agent 1** drop-down.

7. *Optional:* Assign additional agents to these policies from the **Agents 2** and **3** drop-downs.
8. Repeat steps 6-7 on the **Boat**, **Home**, and **Commercial / All Other** tabs.
9. Click **OK** to initiate the Data Replace.
10. Click **Yes** to confirm.

    Once complete, a confirmation dialog opens.
11. Click **OK**.

    After running the Data Replace, double-click on a line-item in the finished report to view the client file and policy. **Verify** that the Agent fields are now correct.
12. Repeat steps 1-11 until all active clients are assigned an Agent.

Related Topics

Backup and Restore Overview
Cleaning up Agency Data
Data Replace Using Advanced Reports
Freshen Indexes [+Video]*
Merging Client Files
Moving a Policy [+Video]
Policy/Company Setup Overview
Process Carrier Downloads
Processing Unmatched Documents

Policy/Company Setup Overview

Policy/Company Setup is an important step in the implementation of your HawkSoft Client Management System. Information for each of your carriers is entered in Policy/Company Setup to enable you to accurately insert policies and integrate policy information with company websites. Setup also ensures the accuracy of both Trust and Commission accounting transactions, and the detail available when reporting.

The information entered in Policy/Company Setup determines the default options available to users when inserting policies in CMS.

- Depending on the number of carriers your agency works with, you will need to set aside adequate time for completing Policy/Company Setup.
- Make sure you have all company information including underwriting guides and commission schedules.
  You will need the following information: Company name and address, email address of underwriter and/or marketing representative, phone numbers, (customer service, underwriting, claims, fax), website information (address of the company's log in page or home page, user names, and passwords for each staff member to log into the carrier's website).
- To save time, use Copy/Paste and Copy/Paste Special when possible.

How Carrier Setup works

Policy/Company Setup is structured around the lines of business the carrier offers.

When you first set up a carrier profile in CMS, you must identify the types of policies the carrier offers and enter carrier information on the corresponding policy type tab(s).

When a carrier offers these LOBs:	Add the carrier to these policy type tabs:
Personal or Commercial Auto, Motorcycle, ATV/Snowmobile, Travel Trailer, RV, and any motorized vehicle with wheels.	Auto
Homeowners, Condo, Renters, Dwelling/Fire (Some carriers include Earthquake and/or Flood in this group)	Home
Boat, Jet Ski, and any other watercraft	Boat
Stand-alone Towing, Rental, and Lockout plans.	MoPro
All commercial policy types as well as miscellaneous policy types, such as Flood, Earthquake, Personal	Commercial/All Other

When a carrier offers these LOBs:	Add the carrier to these policy type tabs:
Umbrella, Inland Marine are set up on the Commercial/All Other tab. Detailed information for the following LOBs: Employee Benefits Setup Umbrella Policies Workers Compensation Classification Codes	

Adding a Carrier

Completing carrier setup should be one of the first steps taken to successfully implement your HawkSoft Client Management System. The information entered in Policy/Company Setup determines the default options available for each carrier when users insert policies in CMS.

Adding a Carrier

Inserting a Carrier Client File

Creating a carrier file in HawkSoft CMS enables you to store carrier information in addition to what is typically stored in Policy/Company Setup, such as additional contacts, phone numbers, e-mail addresses, commission statements, and underwriting guidelines.

Inserting a New Carrier Client File

Policy/Company Setup Shortcuts

HawkSoft CMS provides two shortcut methods for entering a new carrier or updating a carrier based on existing information in Policy/Company Setup.

Policy/Company Setup Shortcuts

Carrier Setup Templates

HawkSoft CMS enables you to create carrier templates for each type of policy. You can use these templates to simplify the process of adding new carriers to CMS when setting up multiple carriers with identical policy information and coverages. The template is then copied and modified to add information that is unique to each carrier.

Carrier Setup Templates

Setting Up a General Agency with Multiple Issuing Carriers

HawkSoft CMS enables you to easily configure carriers, general agencies, or brokerages with multiple issuing carriers. In these instances, it's important to know which parent company or brokerage the policy is written through, as well as the actual carrier that is underwriting the risk.

Configuring Multiple Issuing Carriers

Printing a Carrier Contact Information List

From Policy/Company Setup, you can print a list of your agency's carriers by policy type, including addresses and phone numbers. This can be helpful when maintaining your company setup, such as searching for duplicate companies, checking for name format consistency, etc.

Printing a Carrier Contact Information List

Editing Carrier Information

Changes to carrier contact information, coverages, limits and deductibles, agent codes, and commission information need to be updated in Policy/Company Setup to keep client and policy files up-to-date. This article explains how to make changes to existing carriers in Policy/Company Setup.

Editing Carrier Information

Policy/Company Setup Screens Overview

Policy/Company Setup is an important step in the implementation of your HawkSoft Client Management System. Information for each of your carriers is entered in Policy/Company Setup to enable you to accurately insert policies and integrate policy information with company websites. Setup also ensures the accuracy of both Trust and Commission accounting transactions, and the detail available when reporting.

The information entered in Policy/Company Setup determines the default options available to users when inserting policies in CMS.

This overview provides a list of help topics for each of the screens available when setting up or modifying a carrier.

Policy-Company Setup Screens Overview

Deleting a Carrier

HawkSoft CMS enables you to delete a carrier from Policy/Company Setup. Deleting a carrier will permanently delete the selected carrier profile.

Deleting a Carrier

Adding a Carrier

Completing carrier setup should be one of the first steps taken to successfully implement your HawkSoft Client Management System. The information entered in Policy/Company Setup determines the default options available for each carrier when users insert policies in CMS.

This article describes how to set up a profile for each of your carriers in CMS. A carrier profile includes:

- Contact information
- Web address (and options that affect how CMS interfaces with the carrier website)
- Agent Codes
- Policy information
- Commission information (for agencies that use CMS to track commissions)
- Coverage details

In this topic:

Keys to a Clean Company List	Add a Carrier

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Accounting > Edit Carrier Commission Settings (for agencies using Commission Tracking)
Setup > Policy/Company Setup

See Setting User Permissions for more information.

Keys to a clean company list

In order to glean accurate information from reports, it is important that your companies are set up properly in Policy/Company Setup. For example, you may have the same company listed as Smith and Jones, Smith/Jones, and Smith & Jones in Policy/Company setup, and would like all the names to be consistent. Watch this video to learn how to use carrier reports in HawkSoft to determine which carriers need to be cleaned up, and how to correct the inconsistencies.

To add a carrier

1. Click the **Settings** icon, and then select **Policy/Company Setup**.

   The **Policy/Company Setup** dialog opens.

2. Select one of the available tabs to set up information for each type of policy written with the carrier.

   To add the same carrier information to more than one type of policy, see Policy/Company Setup Shortcuts.

How do I know where to add a carrier?

When a carrier offers these LOBs:	Add the carrier to these policy type tabs:
Personal or Commercial Auto, Motorcycle, ATV/Snowmobile, Travel Trailer, RV, and any motorized vehicle with wheels.	Auto
Homeowners, Condo, Renters, Dwelling/Fire (Some carriers include Earthquake and/or Flood in this group)	Home
Boat, Jet Ski, and any other watercraft	Boat
Stand-alone Towing, Rental, and Lockout plans.	MoPro
All commercial policy types as well as miscellaneous policy types, such as Flood, Earth-	Commercial/All Other

When a carrier offers these LOBs:	Add the carrier to these policy type tabs:
quake, Personal Umbrella, Inland Marine are set up on the Commercial/All Other tab. Detailed information for the following LOBs: Employee Benefits Setup Umbrella Policies Workers Compensation Classification Codes	

3. Select the **State** for which you are adding this carrier.

> If the state you need to add a carrier to is not listed, you will need to add it.
>
> 1. Select **Add State** from the State drop-down.
>   The **Add State** dialog opens.
> 2. Select the state you want to add, and then click **OK**.

4. Click **New**.

   The **New Carrier** dialog opens.

> See Carrier Setup Templates to insert a carrier based on a saved template, or to create a new carrier template. Carrier templates are helpful when setting up multiple carriers with identical policy information.

5. Complete the Policy/Company Setup screens.

   Click the ? at the top of any screen to access available help.

6. After completing all of the Policy/Company Setup screens, click **Finish**.
7. Optional: Repeat this process to set up additional types of policies for this carrier or additional carriers.

   Use Policy/Company Setup Shortcuts to simplify the process of adding additional policies.

8. Click **Close** to exit **Policy/Company Setup** when setup is complete.

Users can now select this carrier when inserting a new policy or editing an existing policy. These settings also ensure that accurate options are available for Program, Policy Form, Agent Code, Term, Policy Title, Coverage Options, and Limits when this carrier is selected.

Related Topics

Policy/Company Setup Overview
Policy/Company Setup Shortcuts

Inserting a New Carrier Client File

Creating a carrier file in HawkSoft CMS enables you to store carrier information in addition to what is typically stored in Policy/Company Setup, such as additional contacts, phone numbers, e-mail addresses, commission statements, and underwriting guidelines.

The Carrier Client file can be linked to from the Contact Information screen in Policy Company Setup for the same carrier. When linked, additional contact information entered in the Carrier Client file displays on the Contact Information screen in Policy Company Setup, as well as the Company View dialog on the Client file.

See Contact Information for linking instructions.

Link from Carrier Information

In this topic:

Inserting a Carrier Client File from the Policy Company Setup	Inserting a Carrier Client File from the CMS Menu Bar

Required Permissions:
In order to complete this task, user permissions must be set to include:

File > Insert Client
Search and Client Access > Access to Client Types > Carrier

See Setting User Permissions for more information.

Inserting a Carrier Client file from Policy Company Setup

During the process of adding a new carrier in Policy Company Setup, you can create a Carrier Client file from the Contact Information screen and create a link to the Carrier Client file.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Policy/Company Setup
>
> See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Policy/Company Setup**.
2. Click **New** to add a new carrier.

   See Adding a Carrier for detailed instructions.
3. Complete the Contact Information screen, and then click the **Link to Carrier Client File** button.

   The **Search** dialog opens.
4. Click **Search**, and then click the **Insert New** button.

   The **Insert Policy** dialog opens with the **Name and Address** side-tab selected.
5. Complete the relevant Name and Address information.

   Certain fields on the Name and Address screen are not relevant to the "Carrier" Client file type, such as **Customer Type**, **Producer**, **CSR**, and **Source**.
6. Check the **Business** check box to activate fields specific to business contacts.
7. Enter the Carrier's **Name**.
8. Optional: Click **Add** under **Contacts and Personal Profiles** to open the Personal Profile dialog and enter contact information for specific individuals.

To enter general contact information in addition to or rather than an individual profile, skip to Step 9.

a. Enter the Personal Profile information for your first contact with this carrier, such as your Underwriter, Marketing Representative, Customer Service Department, etc.
b. Select the contact's job title from the **Occupation** drop-down list.
c. Click **Add** under Contact Info to add phone number, e-mail address, mobile phone number, etc.
d. Click **OK** to save the Contact.
e. Click **OK** to save and close the **Personal Profile** dialog.

9. Optional: Under **Contact Info**, you can add additional phone numbers, fax numbers, and email addresses without setting up personal profiles as detailed above. Be sure to select **< Link To Client (No Profile) >** from the **Profile** drop-down.

   Contact information will display on the Policy/GPI view screen when you click on the underlined **Company** link for linked Carrier Client files.

10. Complete the **Mailing Address** fields on the Name and Address screen.
11. Enter the carrier's **Website** information.
12. Select the **General Policy Information** side-tab.
13. If your agency has multiple office locations, select the **Office** location from the available drop-down.

    The **Company** field defaults to **Prospect** and the **Application Type** field defaults to **Other**. The "other" Application Type creates a policy tab on the client/policy view screen to enable your agency to attach documents to the file.

14. Click **Finish** to save and close the **Insert Policy** dialog.

    The Add Log Entry Comments dialog opens.

15. Add comments as needed, and then click **OK**.

By default, a policy type called "Other" is created for the Carrier Client file. You can attach underwriting guides, company specific forms, and commission statements, etc. to the policy.

Inserting a Carrier Client file from the CMS menu bar

You can insert a Carrier Client file from the CMS menu bar, and then link to it from the carrier file in Policy/Company Setup.

1. In CMS, click **Client** > **Insert** > **All Other** > **New Carrier**.

   The **Insert Policy** dialog opens with the **Name and Address** side-tab selected.

   Certain fields on the Name and Address screen are not relevant to the "Carrier" Client file type, such as **Customer Type**, **Producer**, **CSR**, and **Source**.

2. Check the **Business** check box to activate fields specific to business contacts.
3. Enter the Carrier’s **Name**.
4. Optional: Click **Add** under **Contacts and Personal Profiles** to open the Personal Profile dialog and enter contact information for specific individuals.

   > To enter general contact information in addition to or rather than an individual profile, skip to Step 5.

   a. Enter the **Personal Profile** information for your first contact with this carrier, such as your Underwriter, Marketing Representative, Customer Service Department, etc.

   b. Select the contact's job title from the **Occupation** drop-down list.

   c. Click **Add** under **Contact Info** to add the contact information such as phone number, e-mail address, mobile phone number, etc.

   d. Click **OK** to save the Contact.

   e. Click **OK** to save and close the **Personal Profile** dialog.

5. Under **Contact Info**, you can add additional phone numbers, fax numbers, and email addresses without setting up personal profiles as detailed above. Be sure to select **< Link To Client (No Profile) >** from the **Profile** drop-down.

> Contact information will display on the Policy/GPI view screen when you click on the underlined **Company** link for linked Carrier Client files.

6. Complete the **Mailing Address** fields.
7. Enter the carrier's **Website** information.
8. Click **Finish** to save and close the **Insert Client Only** dialog .

   The Add Log Entry Comments dialog opens.
9. Add comments as needed, and then click **OK**.

By default, a policy type called "Other" is created for the Carrier Client file. You can attach underwriting guides, company specific forms, and commission statements, etc.

Related Topics

Policy/Company Setup: Company Info
Policy/Company Setup Overview

Carrier Setup Templates

HawkSoft CMS enables you to create carrier templates for each type of policy. You can use these templates to simplify the process of adding new carriers to CMS when setting up multiple carriers with identical policy information and coverages. The template is then copied and modified to add information that is unique to each carrier.

In this topic:

> The Commercial/All Other tab contains templates available for you to modify for carriers with Commercial lines of business.

See Policy/Company Setup Shortcuts for instructions on copying existing carrier profiles.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Policy/Company Setup

See Setting User Permissions for more information.

How do I get here?

Click the Settings icon, and then select **Policy/Company Setup**.

The **Policy/Company Setup** dialog opens.

Creating a carrier template

Before creating your first template, add all states you write policies in.

If the state you need to add a carrier to is not listed, you will need to add it.

1. Select **Add State** from the State drop-down.
   The **Add State** dialog opens.
2. Select the state you want to add, and then click **OK**.

1. Select one of the available tabs to set up information for policies your agency writes.

   You will repeat these steps to create a carrier template for each type of policy your agency writes.

How do I know where to add a carrier?

When a carrier offers these LOBs:	Add the carrier to these policy type tabs:
Personal or Commercial Auto, Motorcycle, ATV/Snowmobile, Travel Trailer, RV, and any motorized vehicle with wheels.	Auto
Homeowners, Condo, Renters, Dwelling/Fire (Some carriers include Earthquake and/or Flood in this group)	Home
Boat, Jet Ski, and any other watercraft	Boat
Stand-alone Towing, Rental, and Lockout plans.	MoPro
All commercial policy types as well as miscellaneous policy types, such as Flood, Earthquake, Personal Umbrella, Inland Marine are set up on the Commercial/All Other tab. Detailed information for the following LOBs: Employee Benefits Setup Umbrella Policies Workers Compensation Classification Codes	Commercial/All Other

2. Select one of the states to create a template for.

   The State can be easily changed each time you select this template to add carriers in other states.

3. Click **New**.

   The **New Carrier** dialog opens.

4. Enter **<Template>** in the **Unique Name** field.

5. Leave the remaining fields on this screen blank.

   The information on this screen varies for each carrier.

6. Skip the **Agent Codes** and **Company Website** screens.

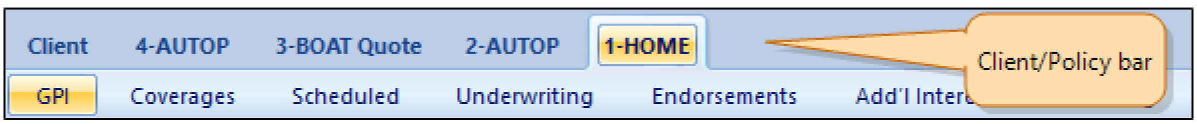
   The information on these screens are specific for each carrier.

7. Select the **Policy Info** tab.

8. Complete the following policy information for your carrier template:

Policy Titles

CMS creates a title for the tabs on the Client/Policy bar in the client file.



CMS automatically determines the policy title when a policy is added with one or more LOBs. Leave the Policy Titles field on the Policy Info screen blank to always use the CMS titles.

- CMS creates a policy title for monoline policies according to the line of business code provided by ACORD.
- When multiple LOBs are packaged together, the policy title is set according to the package Application Type.

> These titles are derived from the line of business codes provided by ACORD. To help maintain consistency, use the policy title set by CMS whenever possible.
>
> See the ACORD Line of Business List CMS uses to determine policy titles.

Create a Custom Policy Title

When the policy title, determined by CMS, does not adequately describe the policy, CMS enables you to create customized policy tab titles.

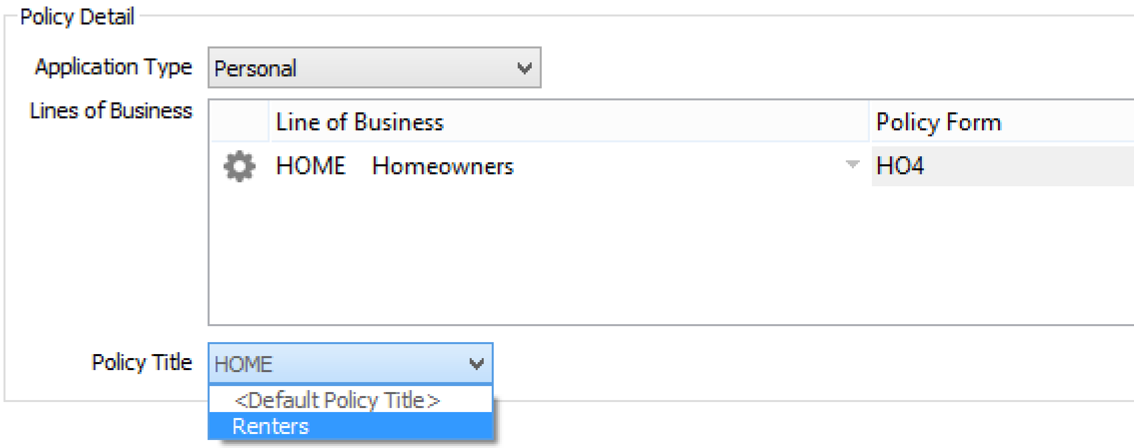
Follow on-screen prompts to **Edit**, **Add**, or **Remove** a policy title.

- Policy Titles are limited to 10 characters or less.
- For reporting purposes, maintaining consistency in creating policy titles is important.

For example:

"Renters" does not exist as an LOB. Renters insurance is written using the LOB "Homeowners" and the Policy Form "HO4". Use the Policy Info screen to add "Renters" as an available policy title on the General Policy Information screen when inserting a renters policy.

The Policy Detail section of the General Policy Information screen for the above example looks like this:



Receipts: Payee

Select Unique Name, Formal Name, or Program to determine the default payee for your agency checks written to this carrier.

Policy Forms

CMS provides a default list of policy forms for each type of policy, and additional forms are available when you click **Add**. Use the **Edit**, **Add**, and **Remove** buttons to modify the default list.

Terms

CMS provides default terms. Use the **Edit**, **Add**, and **Remove** buttons to modify the default list.

9. Click **Next** to skip to the **Coverages** screen.
10. Complete the **Coverages** screen if your agency offers the same coverages for multiple carriers.

    Coverage information is the most helpful to include in your template and will save you time when adding carriers for the same type of policy.

Modify the coverages, as well as the limits and deductibles to include the coverages your agency most often uses.

Click the ? at the top of any screen to access available help.

11. Click **Finish** and then **Close** when your carrier information is set up.

Using a carrier template

1. Select the template created for the type of policy you are setting up for your carrier.
2. Click **Copy To**, and then select the **Type** of policy and the **State** you are setting up a new carrier for.
3. Click **OK**.
4. The <Template> is now listed as a carrier for the selected state.

   If you have copied the template to the same state that the template was originally created for, you will see **<Template>(Copy)** in the list of carriers.
5. Select the copied template, and then click **Edit**.

   The **Edit Carrier** dialog opens.
6. Replace <Template> in the **Unique Name** field with the carrier name.
7. Complete the company information for the carrier, and then click **Next**.

   A warning appears asking you to confirm the Unique Name change from Template to the carrier name.
8. Click **OK** to accept the new Unique Name.
9. Continue to complete the policy and company information that was not included in the template, or may need to be edited for this carrier.

   Click the ? at the top of any screen to access available help.
10. Click **Finish** and then **Close** when your carrier information is set up.

Related Topics

Adding a Carrier

Policy/Company Setup Shortcuts

HawkSoft CMS provides two shortcut methods for entering a new carrier or updating a carrier based on existing information in Policy/Company Setup.

- The **Copy To** option enables you to *copy* a carrier profile from one type of policy and/or state to another.
- The **Copy/Paste Special** method enables you to *copy* specific carrier details from one carrier to another.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Policy/Company Setup

See Setting User Permissions for more information.

In this topic:

See Carrier Setup Templates to insert a carrier based on a saved template, or to create a carrier template. Carrier templates are helpful when setting up multiple carriers with identical policy information and coverages.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

Using the Copy To feature to duplicate carrier information

When you need to add a company to more than one type of policy, and/or more than one state in Policy/Company Setup, you can copy and paste the carrier profile using the **Copy To** button.

Before copying carrier information, verify that the appropriate state is available for the policy type you are copying to. See Adding a Carrier for instructions on adding a state to a policy type.

1. Click the **Settings** icon, and then select **Policy/Company Setup**.
2. Select the tab with the appropriate type of policy, and then select the **State**.
3. Select the company you want to copy.
4. Click **Copy To**.
5. Select the type of policy and state, to copy to.
6. Click **OK**.

   The company name appears on the selected state and policy tab.
7. Highlight the copy, and then click **Edit**.
8. Modify the **Unique Name**, and then make additional changes to the carrier information on each of the Policy/Company Setup Screens, as needed.

   Click the ? at the top of any screen to access available help.

   When you copy and paste from one type of policy to another, it is important to pay special attention to the **Company Info**, **Contact Information**, **Policy Info**, and **Coverages** tabs.

   Email addresses, phone numbers, policy titles, programs, terms, policy types, and Coverages may vary between each base policy type.
9. Click **Finish** when copying and editing carrier information is complete.
10. Click **Close** to exit the Policy/Company Setup dialog.

Using Copy/Paste Special to modify carrier information

Use the **Copy/Paste Special** method to copy specific information from one carrier, and then paste the information to another carrier profile.

Example: Once you set up Coverage defaults on one of your carriers, you can use the Copy/Paste Special method to copy *only* the limits from the first carrier to a different carrier.

1. Cilck the **Settings**icon, and then select **Policy/Company Setup**.
2. Select the tab with the appropriate type of policy, and then select the **State**.
3. Right-click the carrier name in the **Policy/Company Setup** dialog, and then select **Copy**.
4. Navigate to the carrier you want to copy information to.
5. Right-click on the carrier name you want to update, and then select **Paste Special**.

   The **Paste Special** dialog opens.
6. Check the items that you want to copy to the selected carrier.
7. Click **OK**.
8. Repeat steps 2-6 with additional carriers as needed.
9. Click **Close** when edits are complete.

Related Topics

Policy/Company Setup Overview

Policy-Company Setup Screens Overview

Policy/Company Setup is an important step in the implementation of your HawkSoft Client Management System. Information for each of your carriers is entered in Policy/Company Setup to enable you to accurately insert policies and integrate policy information with company websites. Setup also ensures the accuracy of both Trust and Commission accounting transactions, and the detail available when reporting.

The information entered in Policy/Company Setup determines the default options available to users when inserting policies in CMS.

The articles listed below, describe each of the screens available when setting up or modifying a carrier.

See Adding a Carrier and Editing Carrier Information for instructions.

In addition to the help topics listed below, each Policy/Company Setup screen provides on screen help information. Click the ? at the top of any screen to access available help.

Company Info

The **Company Info** screen enables you to enter the carrier names, address, and any notes you want to enter for the company. You can also create a link to a website, program, or file saved on your computer, such as a company rating tool or underwriting document.

Policy/Company Setup: Company Info

Contact Information

The Contact Information screen enables you to enter contact information for the carrier, such as customer service, underwriting, and claims phone numbers, as well as the carrier's default email address.

From this screen, you can also link the carrier to a "Carrier Client file" in CMS. The purpose of a Carrier Client file is to store carrier information in addition to what is typically stored in Policy/Company Setup, such as additional contacts, phone numbers, e-mail addresses, commission statements, and underwriting guidelines.

Policy/Company Setup: Contact Information

Agent Codes

The Agent Codes screen enables you to enter the Agent (Agency)/Producer codes that are assigned by each carrier.

Once they are set up, codes are available for selection from the Agent Code drop-down on the General Policy Information screen when inserting or editing a policy insured with this carrier.

When CMS is configured to map Agent (Agency) Codes for multiple agencies, you can choose to associate each code with a specific office. See .

Policy/Company Setup: Agent Codes

Company Website

The information entered in the Company Website screen determines how HawkSoft CMS integrates with the carrier's website when the website is launched by clicking the 

website button found on the main CMS toolbar, or when Inquiry/Website or Quote/Export is selected in the CMS Action Menu.

Policy/Company Setup: Company Website

Policy Info

The Policy Information screen enables you to customize some of the options available on the General Policy Information screen, Report Layout options, and how the carrier name appears on several documents generated through CMS.

Policy/Company Setup: Policy Info

Commissions

Setting up the Commission screen during Policy/Company Setup is critical for agencies that are using HawkSoft CMS to track commissions. The information you enter on this screen determines the basis (Agency Bill, Premium Paid, Premium Written, or Flat Fee) and percentage (or dollar amount for Flat Fee) for new and renewal business.

This screen is also used to indicate whether commission statements will be received via downloads, in which case, CMS is not used to calculate agency commissions.

Policy/Company Setup: Commissions

Lines of Business/Coverages

This screen includes Lines of Business (LOBs) and customizable lists of coverages, limits, and deductibles for a company. The fields available within this screen vary by the type of policy.

Auto Coverages

Boat Coverages

Commercial/"All Other" Lines of Business Coverages

Home Coverages

Motorist Protection (MoPro) Plan/Coverages/Fees

Configuring Multiple Issuing Carriers

HawkSoft CMS enables you to easily configure carriers, general agencies, or brokerages with multiple issuing carriers. In these instances, it's important to know which parent company or brokerage the policy is written through, as well as the actual carrier that is underwriting the risk.

This article describes how to set up a brokerage or parent company that writes policies under multiple carriers.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Policy/Company Setup
>
> See Setting User Permissions for more information.

How do I get here?

1. Click the **Settings** icon, and then select **Policy/Company Setup**.

   The **Policy/Company Setup** dialog opens.

2. Select the type of policy (Auto, Home, Boat, MoPro, or Commercial/All Other).
3. Select the **State** for the carrier.
4. Click **New** to add a new carrier

   OR

   Select the carrier from the list, and then click **Edit**.

Setting up a General Agency with multiple issuing carriers

Set up each company using the instructions and steps for Adding a Carrier with the following exceptions on the Policy Info screen:

1. Select the **Policy Info** side-tab.
2. In the **Programs** section, check the **Use Program as Formal Name** box.
3. Click **Add**, and then insert the issuing carrier name that you will access through this parent company, general agency, or brokerage.
4. In the **Receipts** section, select **Unique Name** from the **Payee** drop-down, if the receipted premium is payable to the General Agency instead of the issuing carrier.
5. Complete the remaining fields on the Policy Information screen, as well as remaining Policy/Company Setup Screens.
6. Click **Finish** when setup is complete.
7. Repeat this procedure for each of the issuing carriers for this parent company, general agency, or brokerage.

The issuing carriers have now been added to the list of Programs. When adding or modifying a policy, the Company field displays the name of the general agency/brokerage and the Program field displays the name of the issuing carrier. The item listed in the Program field appears as the issuing carrier on all documentation (ACORD forms, ID cards, etc.).

Related Topics

Adding a Carrier
Editing Carrier Information
Policy/Company Setup Overview

Printing a Carrier Contact Information List

From Policy/Company Setup, you can print a list of your agency's carriers by policy type, including addresses and phone numbers. This can be helpful when maintaining your company setup, such as searching for duplicate companies, checking for name format consistency, etc.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Policy/Company Setup

See Setting User Permissions for more information.

To print company contact information list

1. Cilck the Settingsicon, and then select **Policy/Company Setup**.
2. Click on the appropriate policy type tab and select the appropriate **State**.
3. Click **Print**.

   The **Print** dialog box opens.
4. Select a **Printer**, **Page Range**, and **Number of copies**, as needed.
5. Click **Print** to print the company contact information list.

Related Topics

Policy/Company Setup Overview

Additional/Other Interests/Certificate Holder Database

The Additional/Other Interests/Certificate Holder Database is a centralized database of common Loss Payees, Mortgagees, Additional Interests, and Certificate Holders that enables users to easily select a database item when inserting or editing policies.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Additional/Other Interest/Certificate Holder Database

See Setting User Permissions for more information.

Setting up the Additional Interest database

Add Additional Interests and their contact information to the database on this dialog. Users can easily search the database when adding an Additional Interest to the policy.

1. Click the **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.

   The **Additional/Other Interests - Setup** dialog opens.

2. Click **New** to add an Additional Interest to the database.

   The **Add/Edit Additional Interest List** dialog opens.

Modifying the Additional Interest list

Type – Select the type(s) of additional interest. The type can be used as a filter when searching for Additional Interests.

- Loss Payee
- Mortgagee
- Additional Interest
- Certificate Holder

Name and **Address Information** – for the Additional Interest.

> Complete the Zip field to auto-fill the City, State, and County fields.

Contact Information – for the Additional Interest.

Double-click on **Email**, **Fax**, or **Phone** to open the **Edit Contact Information** dialog for the selected Contact Type.

Complete the contact information as needed, and then click **OK**.

Notes – Include additional information for the Additional Interest in the **Notes** field, as needed.

Click **OK** to save the new entry to the database.

3. Click **Close** when Additional Interest setup is complete.

The new entry is now available from the **Additional/Other Interests** database when adding a certificate or an Additional Interest to a policy.

Modifying an entry in the database

1. Click the **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.

   The **Additional/Other Interests - Setup** dialog opens.

2. Select the Additional Interest to be modified from the list, and then click **Edit**.

   - Enter the name of the Additional Interest in the **Filter** field to speed up your search.

     OR

   - Scroll through the list to find the Additional Interest you want to modify.

     The **Add/Edit Additional Interest List** dialog opens with the contact information for the selected Additional Interest.

3. Modify as needed, and then click **OK**.

4. Click **Close** when changes are complete.

Deleting an entry from the database

1. Click the **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.

   The **Additional/Other Interests - Setup** dialog box opens.

2. Select the Additional Interest to be removed from the list, and then click **Delete**.

    - Enter the name of the Additional Interest in the **Filter** field to speed up your search.

      OR

    - Scroll through the list to find the Additional Interest.

      The Additional Interest is removed from the database.

Printing the database

1. Select the Additional Interest type from the **Filter** from the drop-down list.
    - All
    - Loss Payee
    - Mortgagee
    - Additional Interest
    - Certificate Holder
2. Click **Print** to print the database for the selected Additional Interest type.

Accessing the database

The Additional/Other Interests/Certificate Holder Database can be accessed from the **AI Lookup** button when adding Additional Interests to a policy or certificate.

Please see Additional Interests for Auto, Boat, and Home Policies and Additional Interest on a Commercial Policy for more information on using the database to apply an Additional Interest.

Related Topics

Additional Interest on a Commercial Policy
Additional Interests for Auto, Boat, and Home Policies
Certificate of Liability Insurance Overview

Editing Carrier Information

The information entered in HawkSoft CMS for each carrier determines the default options available for each carrier when users edit or insert policies.

Changes to carrier contact information, coverages, limits and deductibles, agent codes, and commission information need to be updated in Policy/Company Setup to keep client and policy files up-to-date. This article explains how to make changes to existing carriers in Policy/Company Setup.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Policy/Company Setup
> Accounting > Edit Carrier Commission Settings (for agencies using Commission Tracking)
>
> See Setting User Permissions for more information.

In order to glean accurate information from reports, it is important that your companies are set up properly in Policy/Company Setup. For example, you may have the same company listed as Smith and Jones, Smith/Jones, and Smith & Jones in Policy/Company setup, and would like all the names to be consistent. Watch this video to learn how to use carrier reports in HawkSoft to determine which carriers need to be cleaned up, and how to correct the inconsistencies.

To edit carrier information

1. Cilck the **Settings**icon, and then select **Policy/Company Setup**.
2. Click on the appropriate type of policy tab, and then select the appropriate **State**.
3. Select the name of the company, and then click **Edit**.

   The **Edit Carrier** Information dialog opens.
4. Make corrections on the Policy/Company Setup Screens, as needed.

   Click the ? at the top of any screen to access available help.

After completing all of the Policy/Company Setup screens, click **Finish**.

Modify additional carriers, or click **Close** to exit **Policy/Company Setup**.

Related Topics

Adding a Carrier
Policy/Company Setup Overview
Policy-Company Setup Screens Overview

Deleting a Carrier

HawkSoft CMS enables you to delete a carrier from Policy/Company Setup. Deleting a carrier will permanently delete the selected carrier profile. This causes invalid company names in any policies associated with the deleted carrier. See Search and Replace for information on updating invalid company names in the database.

In this topic:

Change an Existing Carrier to Inactive	Delete a Carrier

HawkSoft, Inc. recommends that you set carrier status to **Inactive**, rather than delete those carriers. Changing carrier status to inactive prevents users from inserting a new policy with this carrier, but retains the carrier information and configuration settings for existing policies with this carrier. Setting carrier status to inactive also makes it easier to re-activate the company in the event you start writing with the company again in the future.

See Policy/Company Setup: Company Info for more information on setting carrier status to inactive or to reactivate a carrier.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Policy/Company Setup

See Setting User Permissions for more information.

To change an existing carrier to inactive

1. Cilck the **Settings**icon, and then select **Policy/Company Setup**.
2. Click on the appropriate type of policy tab, and then select the appropriate **State**.
3. Highlight the name of the company, and then click **Edit**.
4. With the **Company Info** side-tab selected, select the **Company is inactive** check box.

To reactivate a carrier

In the event you start writing with this company again in the future, uncheck the **Company is inactive** check box to re-activate the company.

1. Cilck the **Settings**icon, and then select **Policy/Company Setup**.
2. Click on the appropriate type of policy tab, and then select the appropriate **State**.
3. Select the **Show Inactive Items** check box.
4. Highlight the name of the company, and then click **Edit**.
5. With the **Company Info** side-tab selected, uncheck the **Company is inactive** check box.
6. Optional: Select the **Company Website** side-tab, and then check the **Quote** check box to include the carrier in the **Bridge To...** dialog when Quote/Export is selected from the Action menu.

   This enables you to send quote information to applicable carrier websites.

To delete a carrier

1. Cilck the **Settings**icon, and then select **Policy/Company Setup**.
2. Click on the appropriate type of policy tab, and then select the appropriate **State**.
3. Highlight the name of the company, and then click **Delete**.
4. Type **Yes** to confirm, and then click **OK**.

The carrier is no longer available from the list. If your agency has policies associated with the deleted carrier, users will receive the Invalid Client Policy Data error message when a policy with that company needs to be updated.

Related Topics

Editing Carrier Information
Policy/Company Setup: Company Info

Sales Pipeline Configuration

HawkSoft supports your agency's Sales Pipeline to help you track and report on your prospects to make sure your new policies move through the process from discovery to sold. It is important to configure HawkSoft to use the Sales Pipeline correctly, for accurate reporting.

See About The Sales Pipeline for more information.

In this topic:

Set Defaults for New Prospects	Customize the Sales Pipeline Sub-Statuses

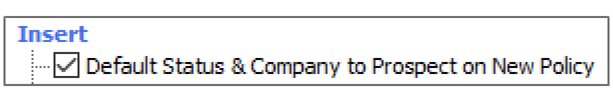
Set your defaults for new prospects

To encourage your agency to utilize the Sales Pipeline, configure your agency's General Settings to always default new policies to Prospect.

1. Click the **Settings** icon, and then select **General Configuration**.

   The **General Configuration** dialog opens, with the **General Settings** side-tab preselected.

2. Select **Default Status & Company to Prospect on New Policy**.

3. Click **OK**.

When this setting is selected, new policies will automatically have the **Policy Status** and **Company** set to *Prospect*.

For commercial policies, make sure you have set up all of your lines of business under the Prospect Company in Policy Company Setup.

Customize the Sales Pipeline Sub-Statuses

The Sales Pipeline policy statuses are available when users insert a prospect policy and are intended to help track prospective business through the sales process. Users can further define the Sales Pipeline by selecting a sub-status.

CMS has default sub-statuses associated with each Sales Pipeline status.

HawkSoft's default Sales Pipeline statuses:

Status	Default Sub-Status	Description
Lead		Indicates possible interest. **Example**: An existing client mentions they might be purchasing a vacation home. You can enter a new Home policy with a Status of Lead and follow up with the client at a later date.
	Unqualified	Client insurance needs are unknown. **Example**: A list of leads in a residential zip code.
	Qualified	Client insurance needs are known. **Example**: A mortgage broker has sent a list of recent mortgage applicants.
Prospect		The client is interested in receiving a quote. The policy has not been sold.
	Discovery	The agency is gathering information needed for underwriting and quoting.
	Submission	The agency has submitted the application to its carriers for approval

Status	Default Sub-Status	Description
		and/or quote. Use Submission Tracking in CMS to track the status and details of the application. SeeTrack Submissions for more information.
	Quote	A quote/offer has been extended to the client.
	Proposal	The agency has issued a formal insurance proposal to the client.
Refused		The client declined the quote/proposal.
	Price	The client declined due to price.
	Didn't Buy Risk	The client did not proceed with purchasing the item to be insured.
Rejected		The policy has been disqualified.
	U/W Rejected	The Underwriter rejected the client's application.
	Agency Disqualified	The policy doesn't meet the agency's standards.

To add and remove Sales Pipeline sub-statuses to the Action menu

You can modify or remove the default sub-statuses and add custom sub-statuses to meet your agency's needs.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Customize Lists

See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Customize Lists**.
2. Select **Sales Pipeline Sub-Statuses** and then click **Edit**.
3. Modify the list as needed.

4. Click **OK** to save.

   You will see your saved sub-statuses next time you use the Action menu Sales Pipeline.

Related Topics

About The Sales Pipeline
Insert a Prospect: Sales Pipeline
Sales Pipeline Reports

Customize HawkSoft CMS

HawkSoft CMS offers a variety of ways to customize your management system to suit your agency's workflows, as well as options for customizing the look of the application.

This article gives an overview of all the options available for customizing HawkSoft CMS.

Agency level

Agency Announcements

HawkSoft CMS enables you to create customized announcements on your Agency's Start Page. You might want to use the Announcement section to display agency news, company goals, and events for your staff.

In addition to text, you can embed images and tables in the Announcement section.

CMS provides a template to help you get started customizing your announcements.

This article provides instructions on activating, customizing, and deactivating Agency Announcements.

Agency Announcements

Agency Logo

HawkSoft CMS enables you to import your agency logo to be included on invoices generated by CMS, ACORD ID cards (other than state specific), correspondence, and on your agency's CMS Start Page.

This article describes how to import your agency logo into CMS, configure the logo to display in CMS, and add to documents.

Agency Logo

Customizing the CMS Toolbar

The main toolbar in HawkSoft CMS contains several buttons which provide shortcuts to perform common transactions in CMS. You can customize the toolbar by adding buttons to provide additional shortcuts for common tasks performed by your agency and you can remove buttons that your agency doesn't use.

This article explains how to customize the toolbar by adding and removing buttons for Action menu related tasks.

See Shortcuts to External Tools [+ Video] to configure button shortcuts to websites or programs (applications), such as a calculator tool or a real estate mapping website, etc.

Customizing the CMS Toolbar

Client Miscellaneous Information

The HawkSoft CMS Client Miscellaneous Information (Client Misc Info) screen displays customized fields you can use to enter data not included in any of the standard fields found in the Edit Client/Policy dialog.

The information in most of these fields can be included in custom reports using Advanced Customized Reports.

The Client Misc Info screen appears blank until the fields are configured. See Setting Up Client Miscellaneous Information Fields for instructions on configuring these fields.

The following article explains how to complete the Client Misc Info dialog after the fields have been set up.

Client Miscellaneous Information

User level

Font Customization

HawkSoft CMS allows you to edit the font type, style, size, and color of certain text categories, such as log text and data text.

This article provides instructions for changing HawkSoft CMS fonts.

NOTE: Font changes are applied only to your computer and will not impact other workstations.

Font Customization

Application Theme

HawkSoft CMS includes themes to customize the look of the CMS application.

This article provides instructions for changing your Application Theme, as well as examples of how each theme appears in CMS.

> **NOTE**: Themes are applied only to your computer and will not impact other workstations.

Application Theme

Shortcuts to External Tools

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

Shortcuts to External Tools [+ Video]

Related Topics

User Setup Overview

Agency Announcements

HawkSoft CMS enables you to create customized announcements on your Agency's Start Page. You might want to use the Announcement section to display agency news, company goals, and events for your staff.

In addition to text, you can embed images and tables in the Announcement section.

CMS provides a template to help you get started customizing your announcements.

This task is typically performed by an Owner/Administrator or Manager.

In this topic:

The Agency Announcement section of the Start Page is active by default. To modify the Agency Announcement default template or to deactivate the Announcement section, you must have permissions to General Configuration.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

To activate or deactivate the Agency Announcement section on the Start Page

1. Click the Settings icon, and then select **General Configuration**.
2. Select the **Agency Announcements** side-tab.
3. Check or uncheck **Show Announcement on Start Page** to include or exclude the Agency Announcement section.
4. Depending on your preference, you can uncheck **Show Title Bar** to remove the title bar from the Announcement section.

To customize your Agency Announcements

On the Start Page, hover your mouse over the top right corner of the Agency Announcement to see and click the **Edit** button.

The Agency Announcement opens in the Editor. The available editing options work the same as Microsoft Word®. Click on the slides below for some helpful editing tips.

For best results, images should be under 1MB (1000KB).

Click on the slides below for some helpful editing tips. You may want to close the Table of Contents window when viewing the slides.

Related Topics

General Agency Configuration
General Settings

Agency Logo

HawkSoft CMS enables you to import your agency logo to be included on invoices generated by CMS, ACORD ID cards (other than state specific), correspondence, and on your agency's CMS Start Page.

This article describes how to import your agency logo into CMS, configure the logo to display in CMS, and add to documents.

In this topic:

Before You Login	Import Your Agency Logo	Display Agency Logo on Start Page
Add Agency Logo to Correspondence Templates		

Before you begin

To import your agency logo, you must first have your logo image saved on your computer or network. HawkSoft recommends saving your logo in one of the following image formats: PNG, JPEG, GIF, BMP, or TIF.

For best results, use an image with a resolution of 1150 x 280 pixels.

To insert a logo into an email, you must insert the image URL (address). When the email is received, the recipient's computer can access the Internet and download the image via the URL. The logo will not display if the image is inserted without a URL.

To import your agency logo

To import your agency logo, you must first have your logo image saved on your computer or network. HawkSoft recommends saving your logo in one of the following image formats: PNG, JPEG, GIF, BMP, or TIF.

For best results, use an image with a resolution of 1150 x 280 pixels.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

For agencies with multiple offices, only one logo can be imported.

1. Click the **Settings** icon, and then select **General Configuration**.

   The **General Settings** dialog opens.

2. Click the **Import** button next to the Agency Logo field.

   File Explorer opens.

3. Navigate to your agency logo file, and then click **Open**.

   The **ID Card Logo Import** dialog opens, and displays your logo.

4. If the logo looks correct, click **Finish**.

   OR

   If the logo does not look correct, click **Cancel**, and then make sure your logo is saved correctly before importing.

5. Click **OK**.

Your agency logo is imported into CMS, and you can opt to display the logo on the Start Page and/or documents.

All Invoices and Auto ID cards (other than state specific) generated by CMS now automatically include your agency logo.

To display your agency logo on the Start Page

Once your logo is imported into CMS, you can display the logo on the Start page.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

1. Click the Settings icon, and then select **General Configuration**.

   The **General Settings** dialog opens.

2. Check the **Show Logo on Start Page** box.
3. Click **OK**.

Your agency logo displays on the Start Page.

To add your agency logo to correspondence templates/correspondence

A logo image saved on your computer or network can be added to letters, memos, proposals, and correspondence templates (for emails, see Email templates or Email, below). HawkSoft recommends saving your logo in one of the following image formats: PNG, JPEG, GIF, BMP, or TIF.

For best results, use an image with a resolution of 1150 x 280 pixels.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

Letters, memos, and proposals

How do I get here?

The CMS Letter Editor opens when creating or editing correspondence templates/correspondence in CMS. The following steps assume you are creating or modifying a correspondence template or correspondence and have the Letter Editor window open.

For more information about creating and editing correspondence templates in CMS, see Correspondence Setup Overview.

For more information about creating and editing correspondence in CMS, see Communications Overview.

1. Position your cursor in the CMS Letter Editor, and then click **Insert** > **Picture**.

   The Windows ® **Open** dialog opens.

2. Browse to locate the image, and then click **Open**.
3. Click **Save & Close** when finished.

Your agency logo is inserted into the correspondence template/correspondence.

Email templates

To insert a logo into an email template, you must insert the image URL (address). When the email is received, the recipient's computer can access the Internet and download the image via the URL. The logo will not display if the image is inserted without a URL.

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **Email** side-tab.
3. Select your template from the list, and then click **Edit**, or click **Add**.

   If you select **Add**, you are prompted to name your new template.

   The Email Template Editor opens.

4. Position your cursor in the Email Template Editor, and then click **Insert** > **Image**.

   The **Image URL** dialog opens.

5. Enter the image URL.
6. Click **OK**, and then click **Save** when finished.

Your agency logo is inserted into the template.

Email

How do I get here?

During the process of sending an email, you can add your logo in the CMS Email message window.

See Email for the different options and required permissions for sending an email.

Inserting an image into an email does not insert the actual image. The image URL (address) is added to the email. When the email is received, the computer must access the Internet and download the image into the email. Images stored on a computer or internal intranet will not be seen by the email recipient.

Pasting images into a CMS Email is not currently supported.

For Outlook email users, you must modify the selected template before creating the email. If you need to modify an email outside of the template, you need to refer to Outlook's Help for options. These instructions only apply when creating an email using the CMS New Message window.

1. With the Email message window open, position your cursor, and then click **Insert** > **Image**.

   The **Image URL** dialog opens.

2. Enter the image URL.
3. Click **OK**.

Your agency logo is inserted into the email.

Related Topics

Auto ID Card
Communications Overview
Correspondence Setup Overview
General Settings
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)
Modifying Email
Modifying Email Templates

Customizing the CMS Toolbar

The main toolbar in HawkSoft CMS contains several buttons which provide shortcuts to perform common transactions in CMS. You can customize the toolbar by adding buttons to provide additional shortcuts for common tasks performed by your agency and you can remove buttons that your agency doesn't use.

This article explains how to customize the toolbar by adding and removing buttons for Action menu related tasks.

See Shortcuts to External Tools [+ Video] to configure button shortcuts to websites or programs (applications), such as a calculator tool or a real estate mapping website, etc.

In this topic:

Default Action Menu Toolbar Buttons	Customize Action Menu Toolbar

Changes to the toolbar, which include Action menu shortcuts, are seen by all users in the agency and cannot be customized for an individual user.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

Default Action menu toolbar buttons

The buttons below are included with the CMS installation. These buttons provide shortcuts for Action menu transactions and create a log note documenting the transaction. These buttons cannot be modified, however they can be removed and new buttons can be added.

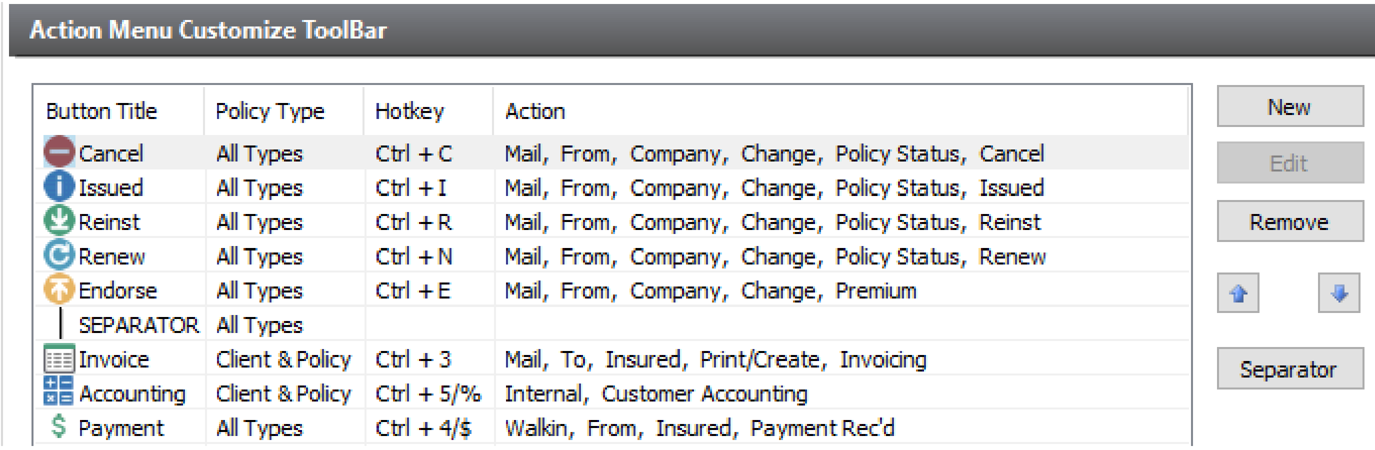
Default Button	Action Menu Shortcut
	Mail > From > Company > Change Policy Status > Cancel See Changing Policy Status for more information.

Default Button	Action Menu Shortcut
Issued	Mail > From > Company > Change Policy Status > Issued See Changing Policy Status for more information.
Reinst	Mail > From > Company > Change Policy Status > Reinstate Opens the Reinstatement Date dialog. See Changing Policy Status for more information.
Renew	Mail > From > Company > Change Policy Status > Renew Opens the Renewal Date dialog and additional screens for modifying the policy. See Changing Policy Status for more information.
Endorse	Mail > From > Company > Change Client/Policy Opens the Premium Change dialog.
Invoice	Mail > To > Insured > Print > Invoicing Opens the Invoices and Payments dialog .
Payment	Walk-in > From > Insured > Payment Opens the Payment dialog box to create a receipt when the insured comes into the office. If there is an invoice with a balance due, the Open Invoices dialog box opens enabling you to apply the payment to any open invoices. Use the **Action** menu to document money received from a customer in any other manner, such as **Mail** > **From** > **Insured**.
Accounting	Internal > Accounting Opens the Accounting menu.

To customize the Action Menu toolbar options

1. Click the **Settings** icon, and then select **General Configuration** from the main CMS menu bar.
2. Select the **Action Menu Customize Toolbar** side-tab.

   A table opens with a description of the icons currently on the toolbar.



Button Title	Policy Type	Hotkey	Action
Cancel	All Types	Ctrl + C	Mail, From, Company, Change, Policy Status, Cancel
Issued	All Types	Ctrl + I	Mail, From, Company, Change, Policy Status, Issued
Reinst	All Types	Ctrl + R	Mail, From, Company, Change, Policy Status, Reinst
Renew	All Types	Ctrl + N	Mail, From, Company, Change, Policy Status, Renew
Endorse	All Types	Ctrl + E	Mail, From, Company, Change, Premium
SEPARATOR	All Types		
Invoice	Client & Policy	Ctrl + 3	Mail, To, Insured, Print/Create, Invoicing
Accounting	Client & Policy	Ctrl + 5/%	Internal, Customer Accounting
Payment	All Types	Ctrl + 4/$	Walkin, From, Insured, Payment Rec'd

Policy Type – The types of policies the button can be used with

Hotkey – The keystrokes that launch the action

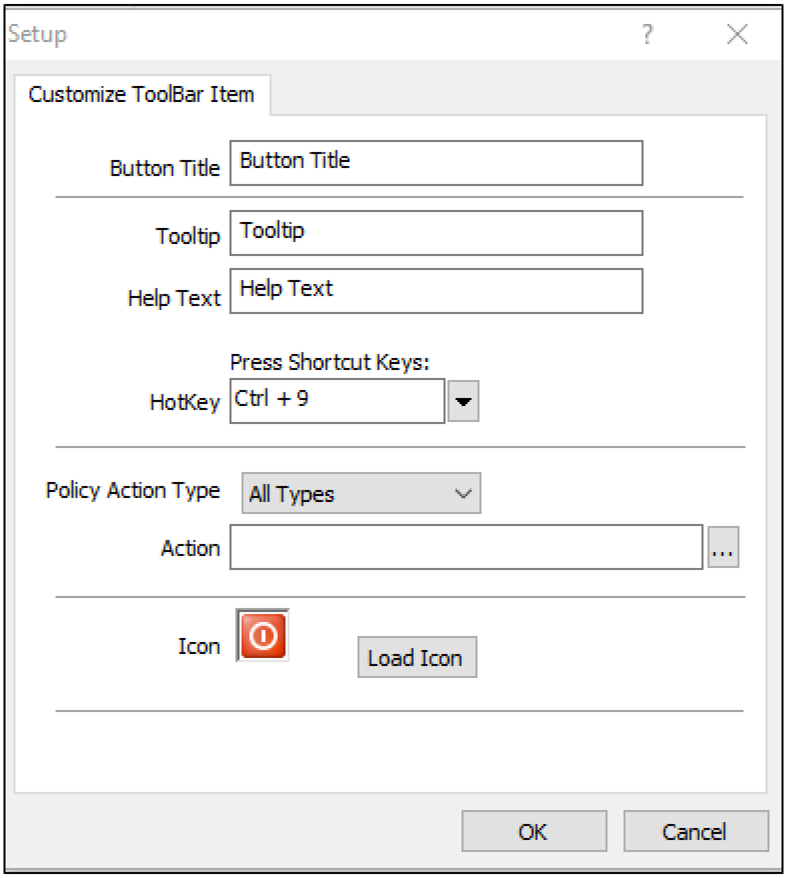
Action – The Action menu steps performed when using this button.

3. Customize the toolbar as needed.

Click to create a new toolbar item.

Select a previously added item, and then click Edit to make modifications.

a. Complete the **Setup** dialog to create a new item or modify an existing item:



Button Title – The title appears below the icon image.

Tooltip – Pop-up text that appears when a user hovers the mouse over the icon.

Help Text – A brief description of the icon that appears below the Tooltip when a user hovers over the icon.

Hotkey – CMS keystrokes that launch the action. The hotkey displays when a user hovers over the icon.

Policy Action Type – Types of policies this toolbar item is used for.

Action – Click the ellipsis  button to open the Action menu, and then select the actions this toolbar icon will perform when clicked.

Icon – Click **Load Icon**, and then select a Windows image to display for this toolbar item.

b. Click **OK**.

Remove Select a previously added item and then click Remove to delete the button from the toolbar.

Click the arrows to change the position of a selected button.

Separator Click to insert a separator to organize the buttons into sections.

Use the arrows to move the separator between two buttons.

Default Click to restore the toolbar to the CMS default items.

> Custom icons will not be deleted when default items are restored.

4. Click **OK** when finished.

Related Topics

General Agency Configuration
Shortcuts to External Tools [+ Video]
Toolbar Icons

Setting Up Client Miscellaneous Information Fields

The HawkSoft CMS Client Miscellaneous Information (Client Misc Info) screen displays customized fields you can use to enter data not included in any of the standard fields found in the Edit Client/Policy dialog.

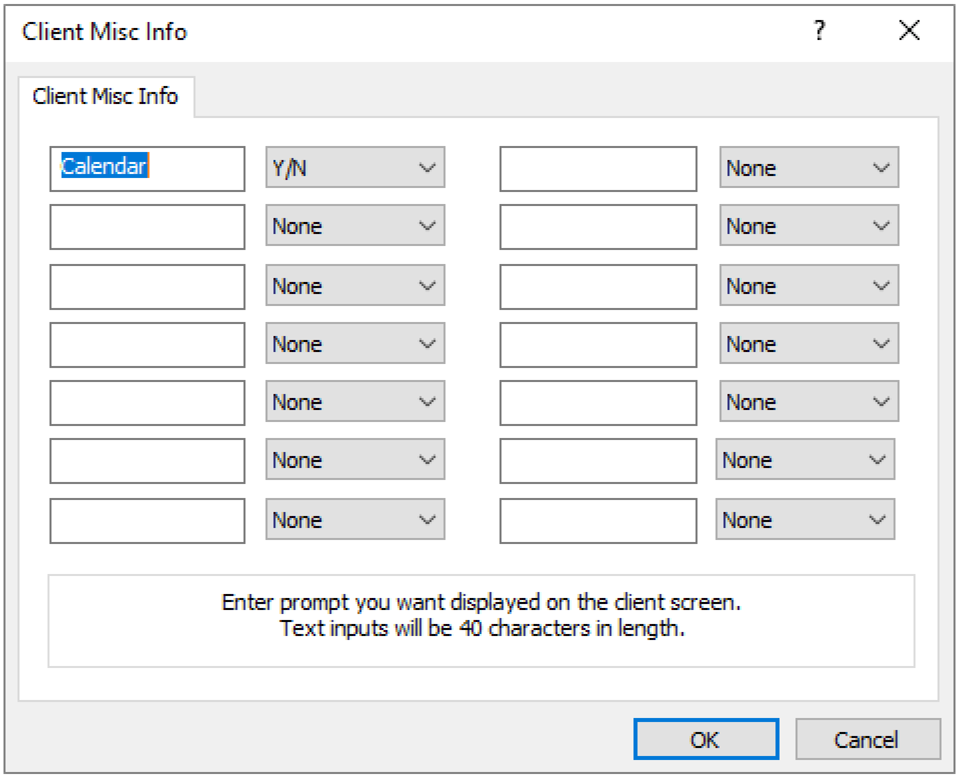
Once the Client Miscellaneous Information fields are set up, they are available on the **Client Misc Info** screen when inserting or modifying client information.

The data in most of these fields can be included in custom reports created using Advanced Reports.

> Fields created in Client Miscellaneous Information setup are available in all client file types.

Example:

ABC Insurance Agency sends a yearly calendar to clients that fit the agency's "send calendar" requirements (whatever these may be). The agency needs a reportable field to determine how many calendars to order. ABC Insurance creates a miscellaneous client information field labeled *Calendar*, and selects the Y/N format. Now ABC Insurance can run a report at the end of the year based on the Yes or No answers.



This task is typically performed by an Owner/Administrator or Manager.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Client Misc. Info

See Setting User Permissions for more information.

To set up Client Miscellaneous Information fields

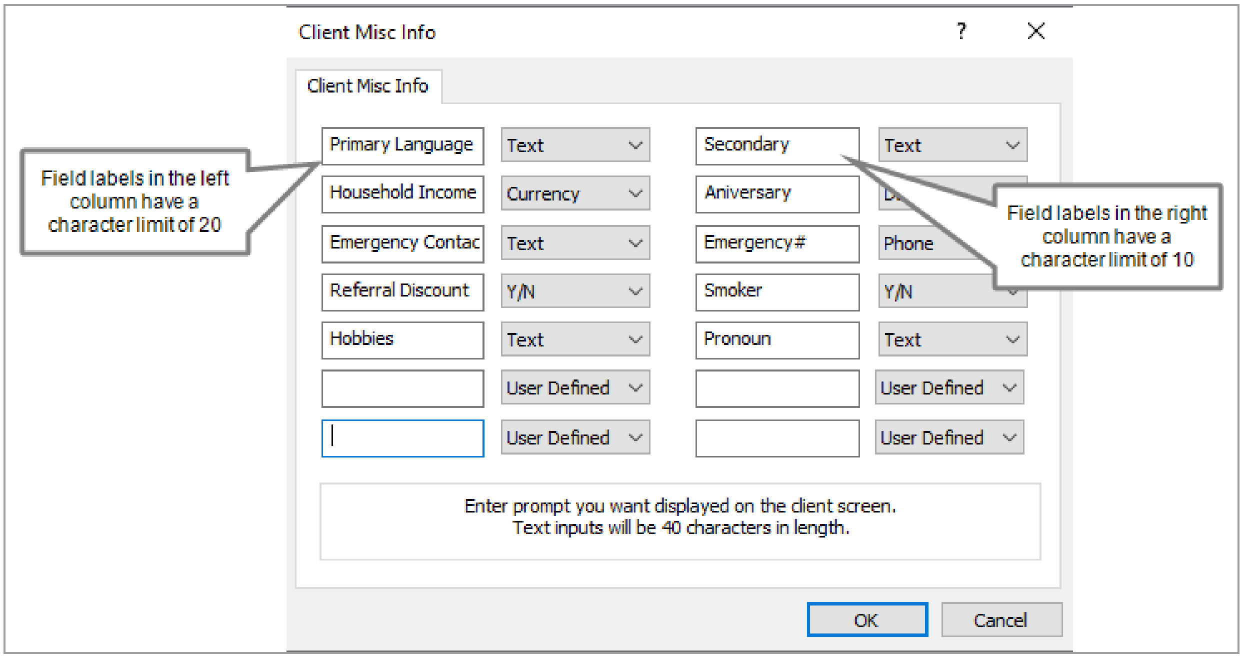
1. Click the **Settings** icon, and then select **Client Misc. Info** from the main CMS menu bar.

   The **Client Misc Info** dialog displays fourteen customizable fields that can be included in the client file.

2. Type a label to create a field.

   Example: Preferred Language, Calendar, Mailing List, etc.

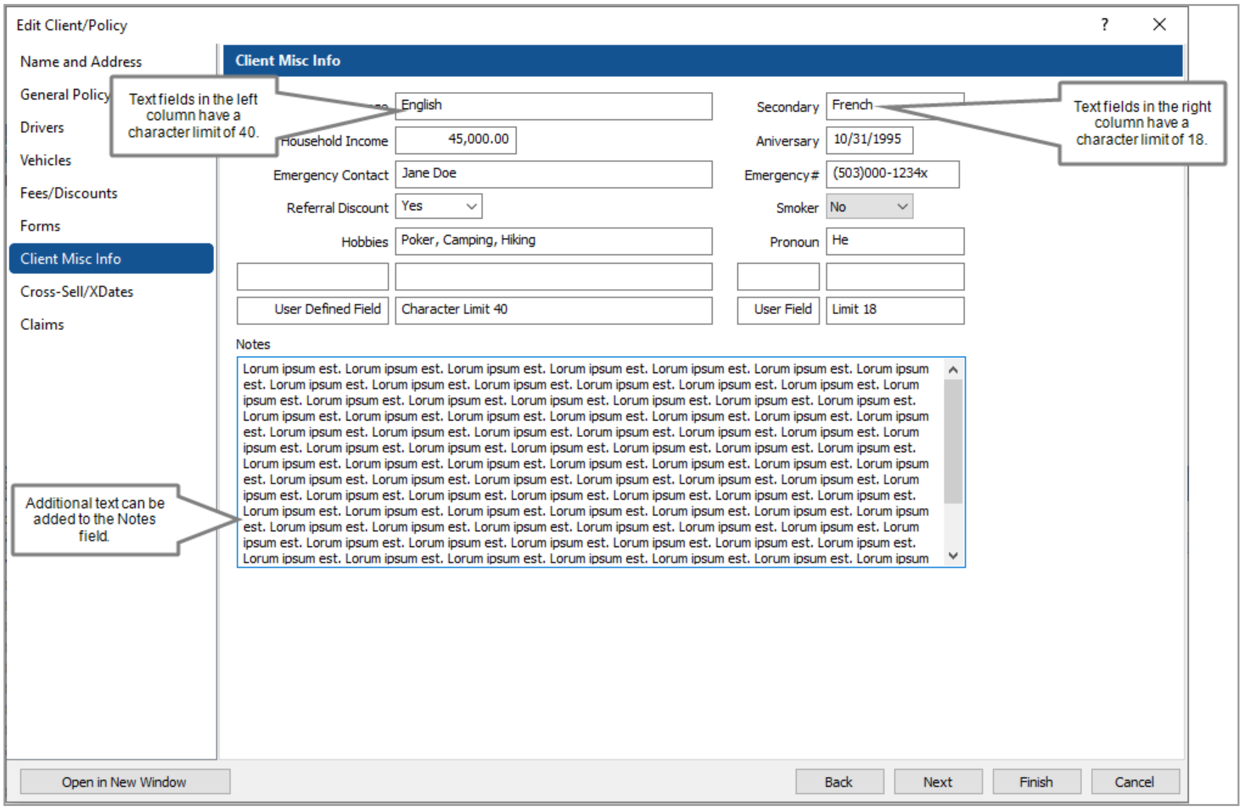
Character limits for field labels:



3. Select a format from the drop-down list for each data type.

Data Format	User can enter or select:
None	Data cannot be entered
Text	Free form text
Currency	Dollar amount entries up to $9,999,999.99
Date	XX/XX/XXXX
Number	Numeric entry
Phone	(###) ###-####-####
Sex	Female or Male
Y/N	Yes or No
User Defined	customizable field label paired with a free-form input field with no format restrictions. Data entered in a user defined field is not available for reporting purposes.

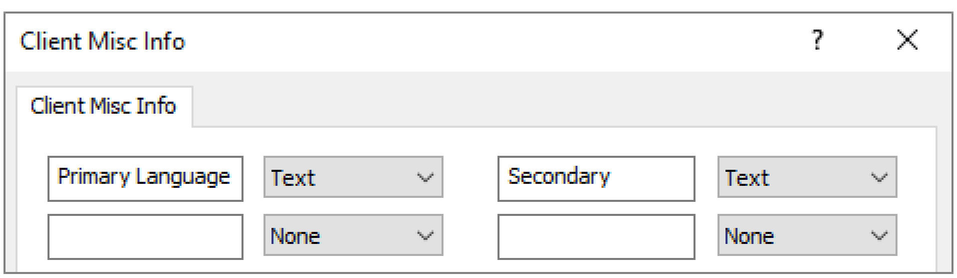
Character limits for field data:



4. Click **OK**.

The fields appear on the Client Misc Info side-tab in the client file in the order they are entered on this setup screen.

Example: If you want a field labeled *Primary Language* to appear to the left of another field labeled *Secondary Language*, create the Primary Language field in the left-hand column and the Secondary Language field in the right-hand column.



Configure your list so that unused fields (those set to **None**) occur at the bottom of the list(s) so that empty spaces do not occur between available fields.

The customized fields are now available on the Client Miscellaneous Information screen when inserting or modifying client information.

Related Topics

Client Miscellaneous Information
Clients Overview

Font Customization

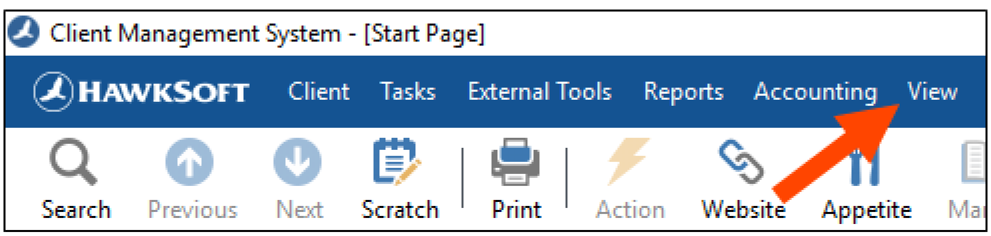
HawkSoft CMS allows you to edit the font type, style, size, and color of certain text categories, such as log text and data text.

This article provides instructions for changing HawkSoft CMS fonts.

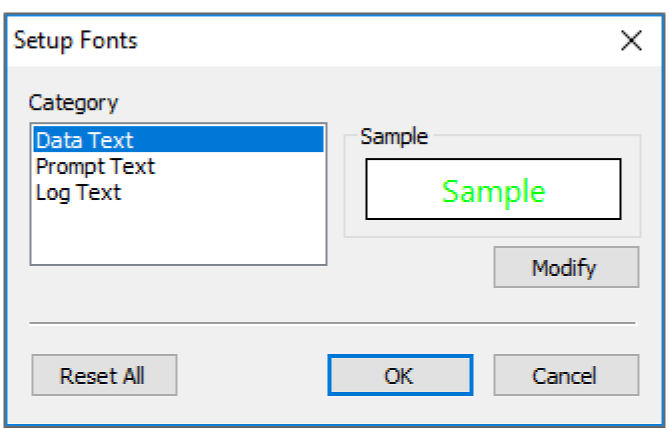
> Font changes are applied only to your computer and will not impact other workstations.

To customize fonts

1. Click **View** from the main CMS menu bar, and then select **Fonts**.



The **Setup Fonts** dialog opens.



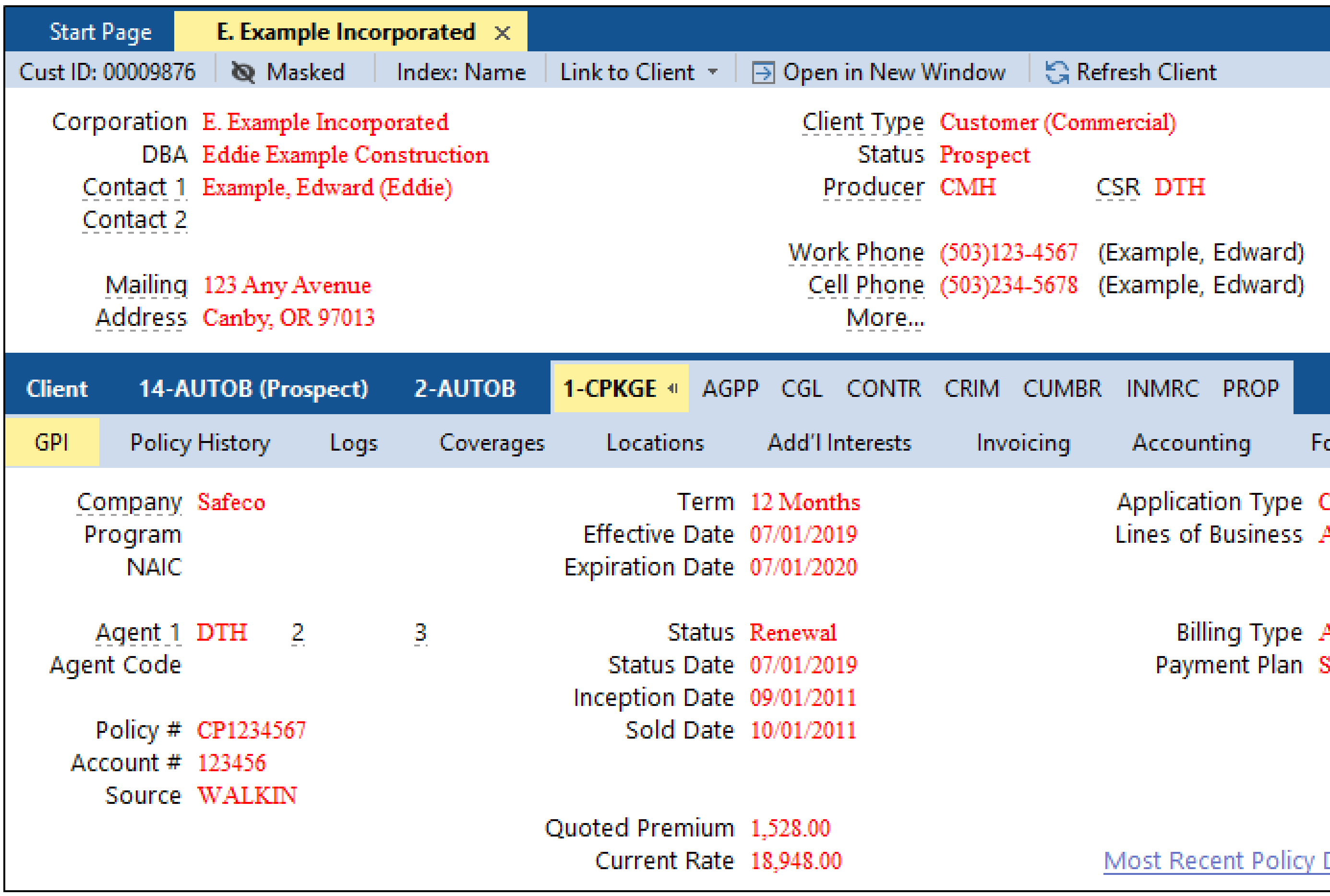
2. Select a **Category**:

Data Text

Changes the font for the client and policy data on the view screens.

Example:

The Data Text has been changed to a red Times New Roman font in the image below.

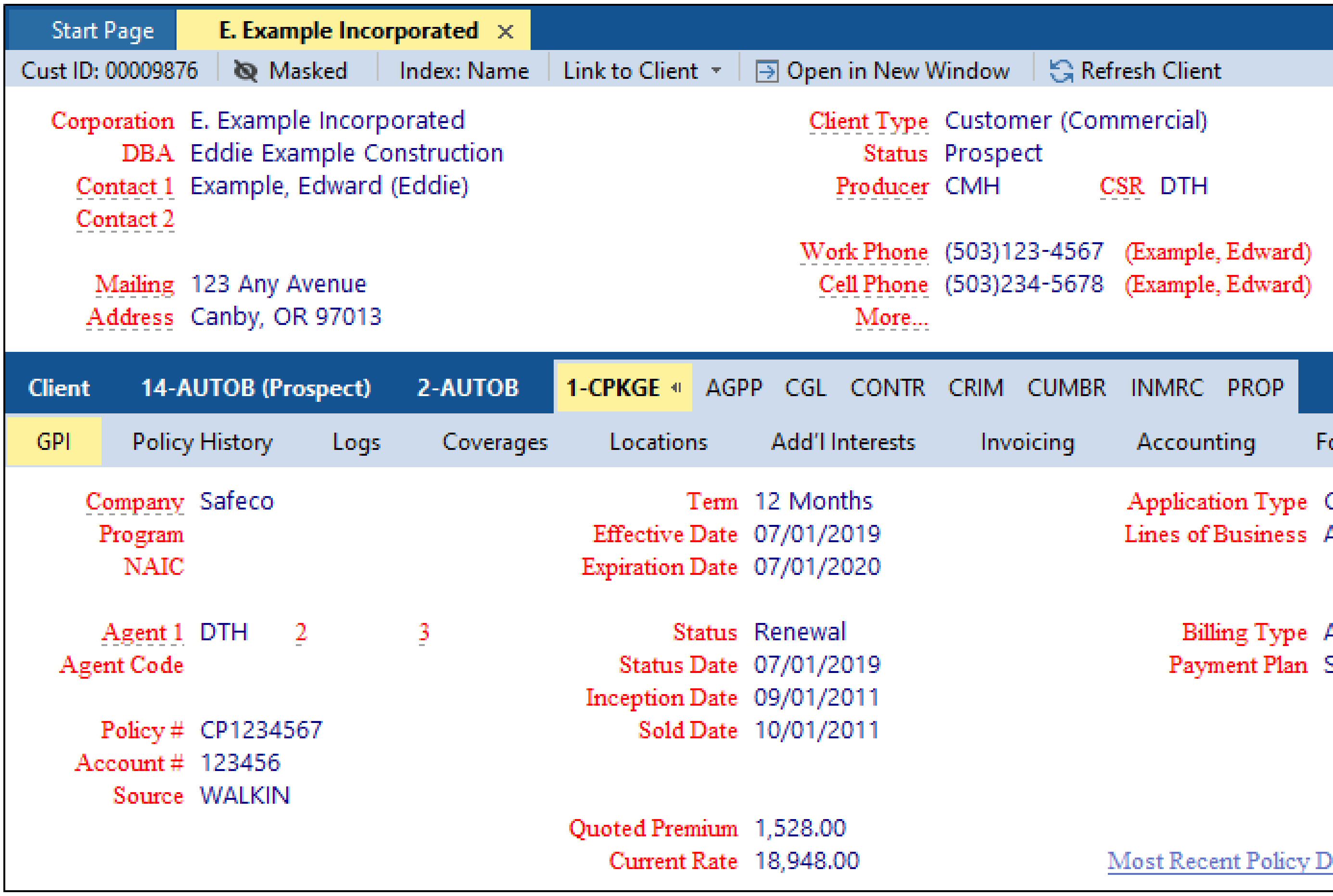


Prompt Text

Changes the font for the Data labels for the client and policy view screens.

Example:

The Prompt Text has been changed to a red Times New Roman font in the picture below.



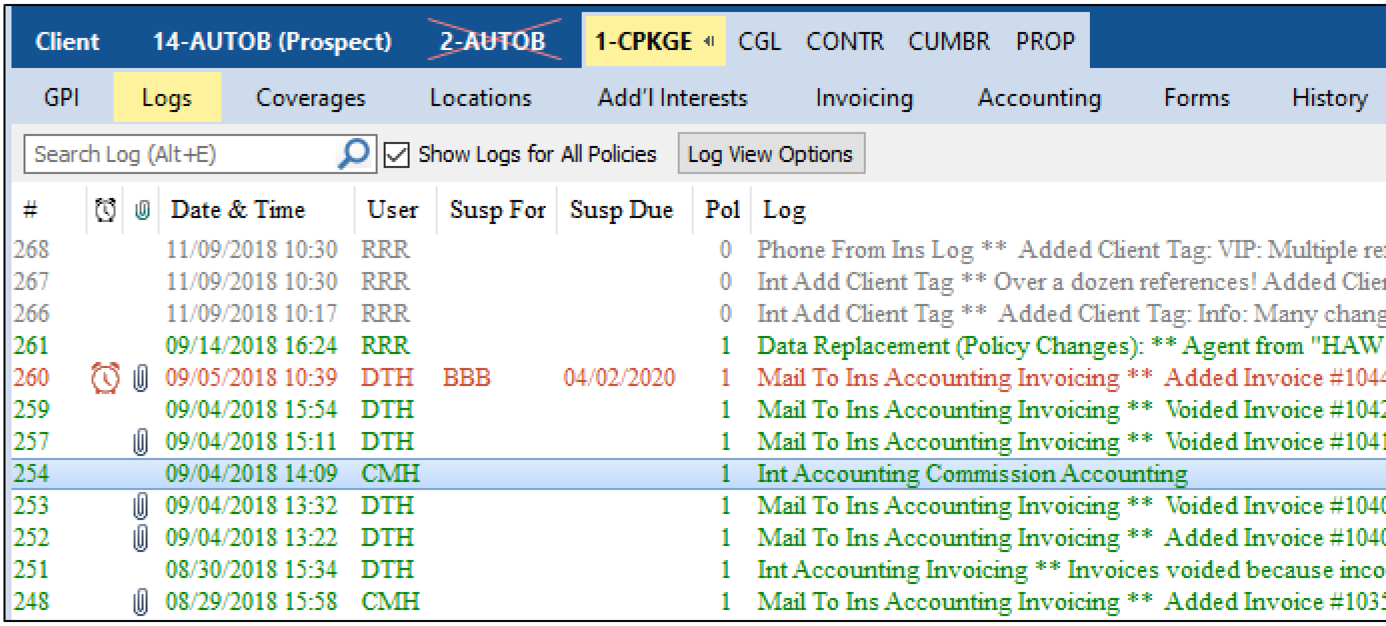
Log Text

Changes the font for the list of log notes in the client/policy.

> Changing the color of this font does not affect the color of the text inside a log note, suspended log notes, or log notes on policies other than the one currently selected.

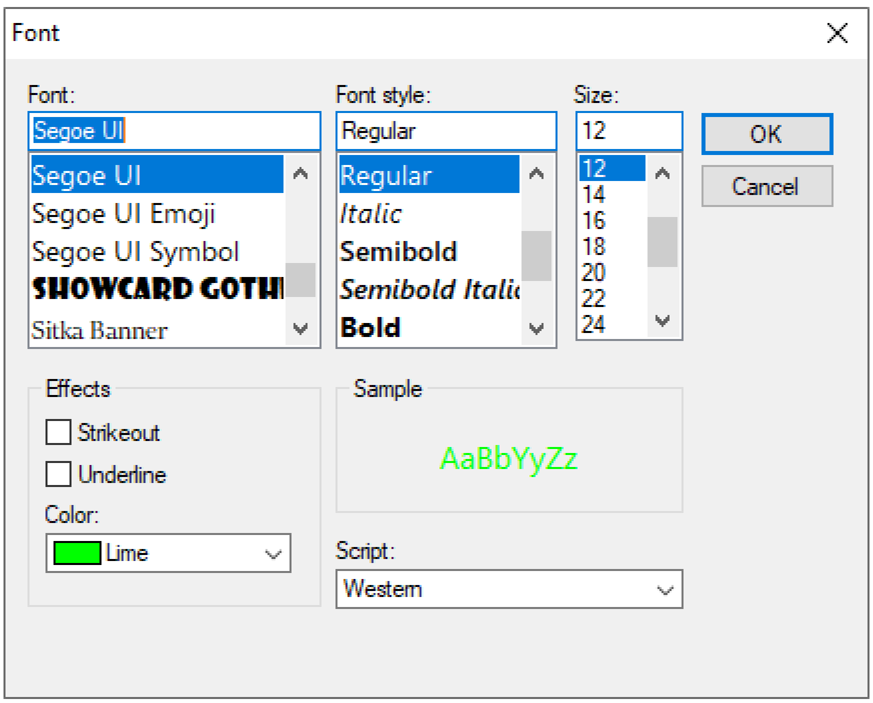
Example:

The Font Text has been changed to a green Times New Roman font in the picture below.



3. Click **Modify**.

   The **Font** dialog opens for you to customize the font for the selected Category.

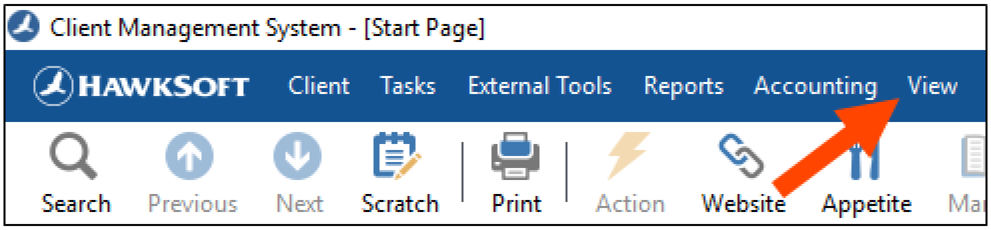


4. Click **OK** to save your changes.
5. Optional: Select another category to modify.
6. Click **OK** to close the **Setup Fonts** dialog.

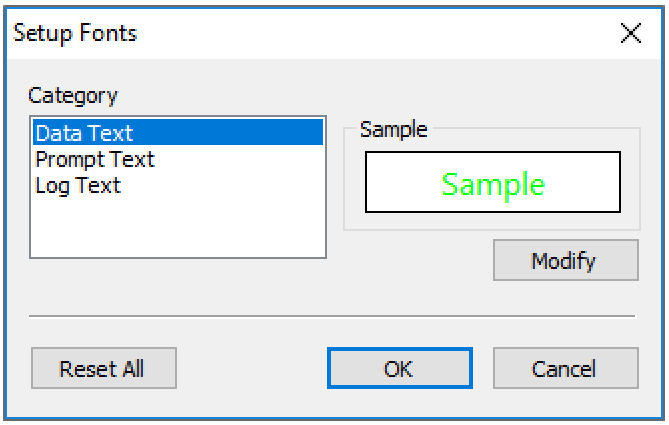
   Your fonts are customized and saved to your profile.

To reset fonts to default settings

1. Click **View** from the main CMS menu bar, and then select **Fonts**.



The **Setup Fonts** dialog opens.



2. Click **Reset All**.
3. Click **OK**.

All fonts have been reset to the default settings.

Related Topics

User Preferences
User Setup Overview

Application Theme

HawkSoft CMS includes themes to customize the look of the CMS application.

This article provides instructions for changing your Application Theme, as well as examples of how each theme appears in CMS.

In this topic:

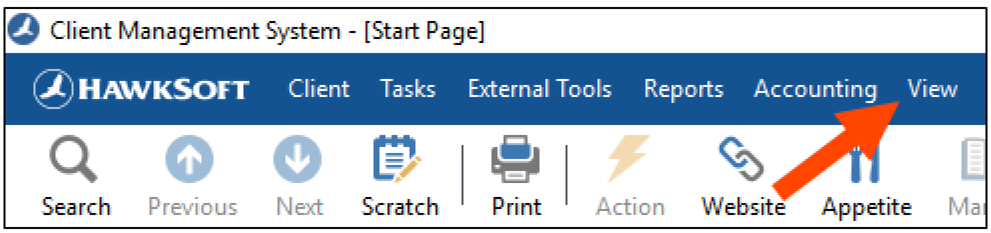
Change Your Application Theme	Examples of Themes

Themes are applied only to your computer and will not impact other users.

Required Permissions:
To perform this task, no specific CMS user permissions are required.

To change your Application Theme

1. Click **View** from the main CMS menu bar, and then select **Application Theme**.



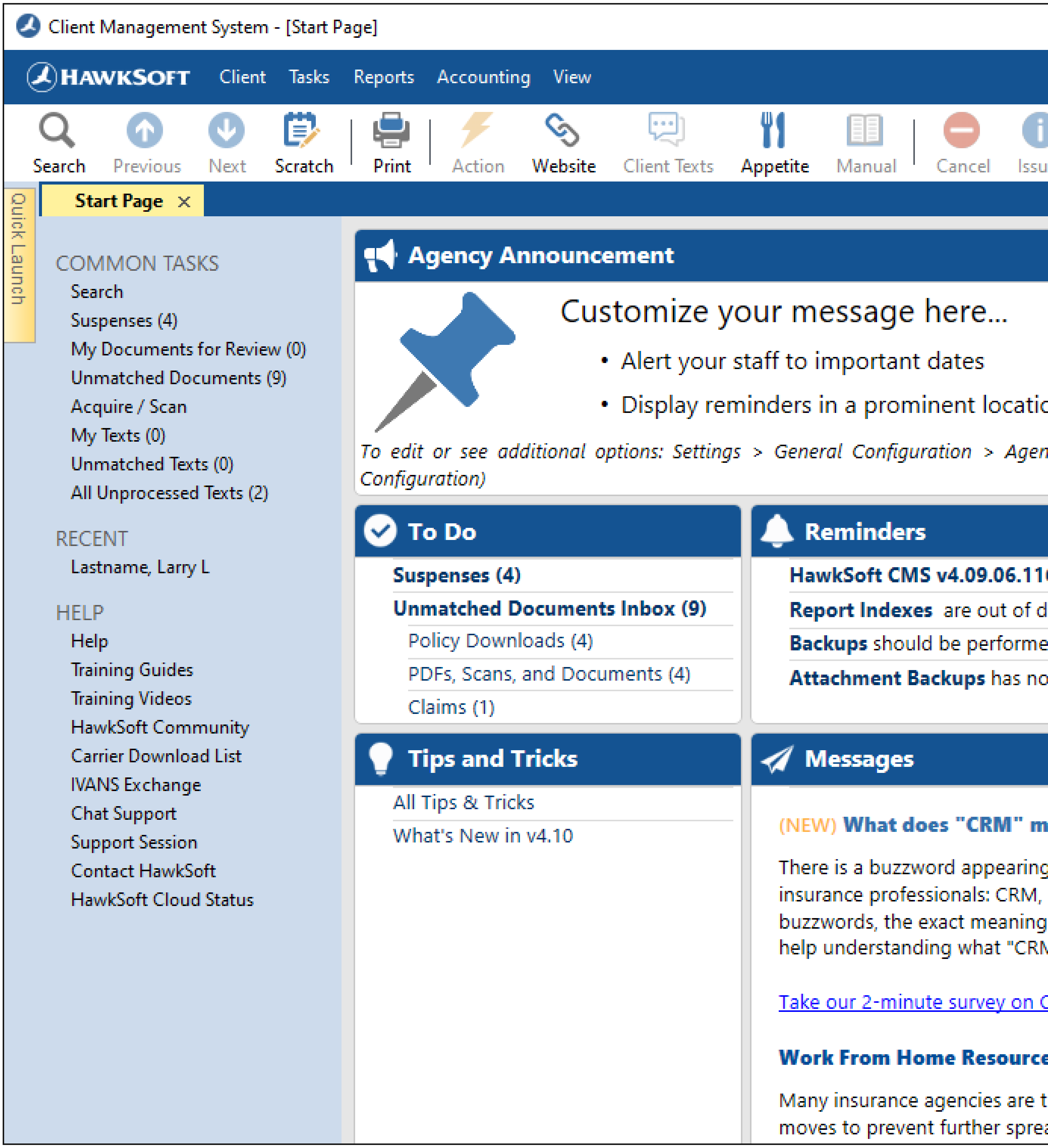
   The list of available themes appears.

2. Select the **Light Blue**, **Dark Blue**, or **Dark** theme.

   The selected theme applies to all CMS windows on your workstation.

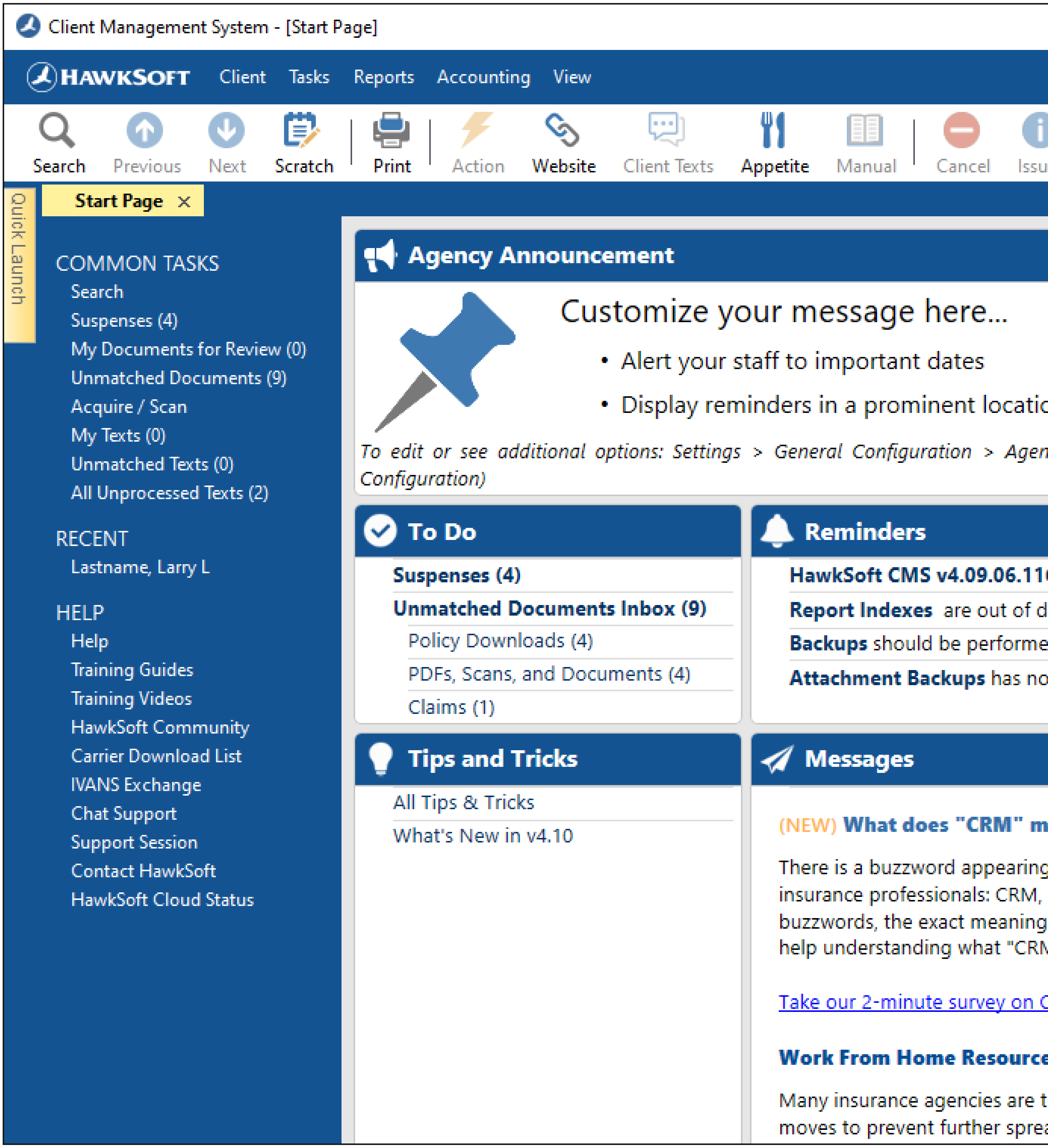
Examples of themes

Light Blue (Default)

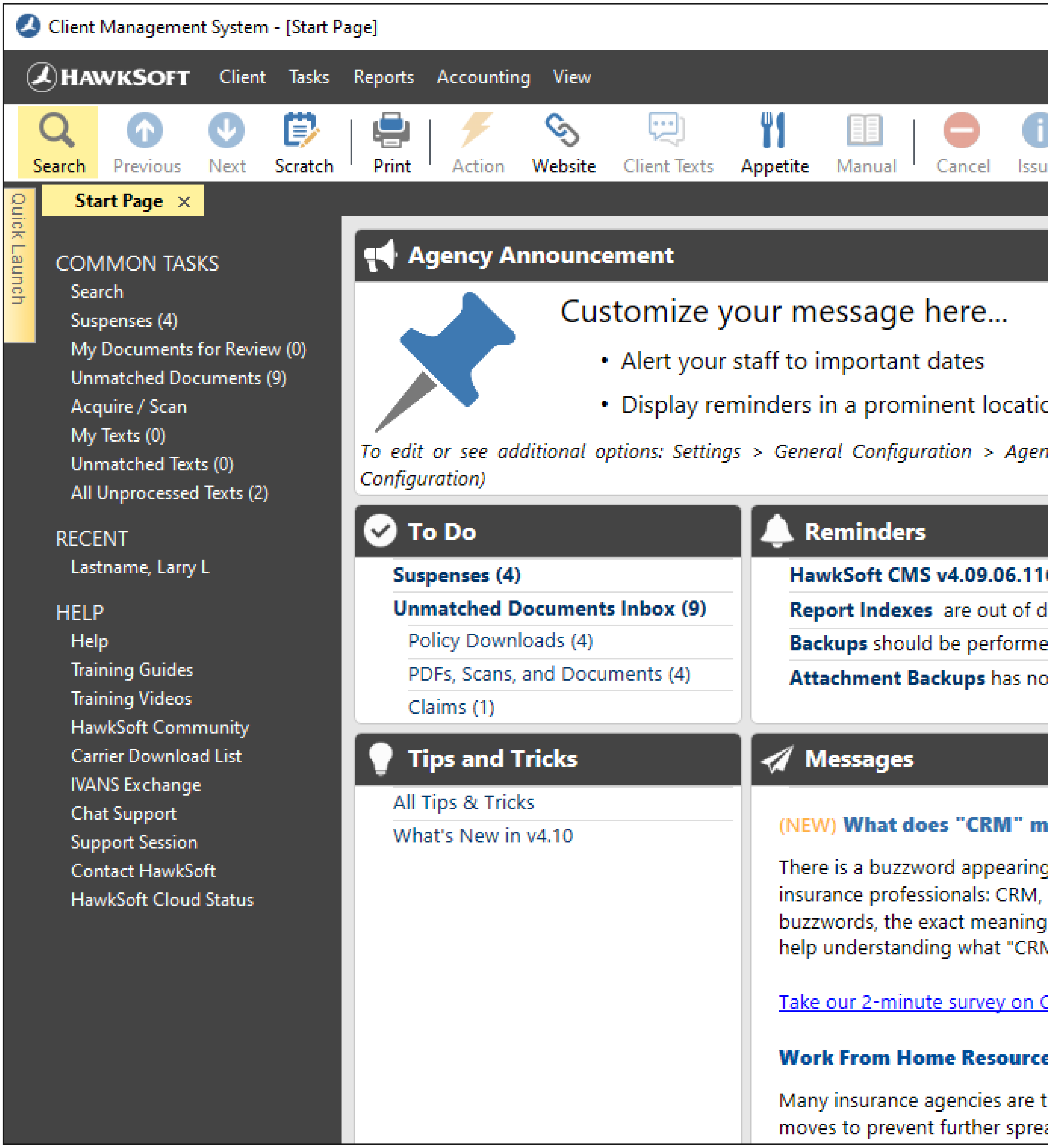


Client Management System - [Start Page]
HAWKSOFT
Client
Tasks
Reports
Accounting
View
Search
Previous
Next
Scratch
Print
Action
Website
Client Texts
Appetite
Manual
Cancel
Quick Launch
Start Page
COMMON TASKS
Search
Suspenses (4)
My Documents for Review (0)
Unmatched Documents (9)
Acquire / Scan
My Texts (0)
Unmatched Texts (0)
All Unprocessed Texts (2)
RECENT
Lastname, Larry L
HELP
Help
Training Guides
Training Videos
HawkSoft Community
Carrier Download List
IVANS Exchange
Chat Support
Support Session
Contact HawkSoft
HawkSoft Cloud Status
Agency Announcement
Customize your message here...
• Alert your staff to important dates
To edit or see additional options: Settings > General Configuration >
Configuration)
To Do
Suspenses (4)
Unmatched Documents Inbox (9)
Policy Downloads (4)
PDFs, Scans, and Documents (4)
Claims (1)
Reminders
Report Indexes
Backups
Attachment Backups
Tips and Tricks
All Tips & Tricks
What's New in v4.10
Messages
(NEW)

Dark Blue


Client Management System - [Start Page]
HAWKSOFT
Client
Tasks
Reports
Accounting
View
Search
Previous
Next
Scratch
Print
Action
Website
Client Texts
Appetite
Manual
Cancel
Quick Launch
Start Page
COMMON TASKS
Search
Suspenses (4)
My Documents for Review (0)
Unmatched Documents (9)
Acquire / Scan
My Texts (0)
Unmatched Texts (0)
All Unprocessed Texts (2)
RECENT
Lastname, Larry L
HELP
Help
Training Guides
Training Videos
HawkSoft Community
Carrier Download List
IVANS Exchange
Chat Support
Support Session
Contact HawkSoft
HawkSoft Cloud Status
Agency Announcement
Customize your message here...
Alert your staff to important dates
To edit or see additional options: Settings > General Configuration >
Configuration)
To Do
Suspenses (4)
Unmatched Documents Inbox (9)
Policy Downloads (4)
PDFs, Scans, and Documents (4)
Claims (1)
Reminders
Report Indexes
Backups
Attachment Backups
Tips and Tricks
All Tips & Tricks
What's New in v4.10
Messages
(NEW)
There is a buzzword appearing
insurance professionals: CRM,
Work From Home Resource

Dark



Related Topics

User Preferences
User Setup Overview

Shortcuts to External Tools [+ Video]

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

> External tools can launch applications only if the application is installed on the same computer CMS is running on.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Computer Specific Settings
>
> See Setting User Permissions for more information.

In this topic:

Set up a website or program	Additional button options

To set up a website or program

1. Click the **Settings** icon, and then select **Computer Specific Settings** from the main CMS menu bar.

   The **Computer Specific Settings** dialog opens.
2. Click the **External Tools** tab.
3. Click **New** to set up a new external tool, and complete the following:
   - **Tool Name** – Name the external tool.
   - **Tool Type** – Select **Program** (application) or **Website** from the drop-down list.

- **Tooltip** – Enter the tool name as you want it to appear when you hover your mouse over the toolbar icon.
- **Help Text** – Enter a description of the tool. This can include the keyboard shortcut associated with the toolbar button.

  This description appears as part of the Tooltip when you hover your mouse over the toolbar icon.
- **Command** – Enter or browse to the program (application) path or website URL:
  - For a website, enter the URL
  - For a program, enter the path to the .exe file

    See the following table for a list of common programs and commands:

Tool Name	Command
Excel	Excel
Outlook	Outlook
Word	Winword
PowerPoint	Powerpnt
Chrom-	Chro-

Tool Name	Command
e	me
Internet Explorer	iexplore
DS-Pro	DS-Pro
Publisher	mspub

- **Arguments** – Use to send command line arguments to the EXE. (Optional: Used only when the tool type is Program.)
- **Initial Directory** – This field automatically defaults to the same path as the Command field. (Optional: Used only when the tool type is Program.)
- Select **Show on Tools Menu**, **Show on Quick Launch Panel**, and/or **Show on Toolbar** to designate where links to the tool appear.

4. Click **Test** to verify your setup.

   Your program or website launches.

5. Click **OK** to save changes and return to the **External Tools** screen.
6. Click **OK** to close the Computer Specific Settings dialog.

   A link to the new tool displays in CMS at the designated location.

Additional button options on the External Tools screen

- **Edit** – Highlight an item from the list, and then click **Edit** to modify.
- **Delete** – Highlight an item from the list, and then click **Delete** to remove the link.
- **Arrows** – Highlight an item from the list, and then click the Up or Down arrow to move the items up or down on the list.
- **Separator** – Click to insert a dividing line that displays between external tools you have designated to show on the main CMS toolbar. If selected, CMS adds a separator to the bottom of the external tools list, and then you can use the navigation arrows to place the separator.

Related Topics

Customizing the CMS Toolbar

Customize Lists Overview

HawkSoft CMS includes a variety of menu lists accessed from the Action menu and various drop-down menus throughout CMS. You can customize many of these lists to meet your agency's workflow and/or tracking purposes.

Customizing Lists

This article describes how to customize the menu lists available from the Action menu and from several drop-downs throughout CMS.

Customizing Lists

See the Customized Lists video.

Cancellation Sub-Status Setup

HawkSoft CMS enables you to add additional sub-statuses to the Cancellation statuses available from the Action menu.

The Cancellation statuses are intended to track policies that have been canceled. The sub-statuses associated with each Cancellation status are used to further define the reasons for the cancellation.

Cancellation Sub-Status Setup

See the Customizing Sub-Statuses video.

Sales Pipeline Sub-Status Setup

HawkSoft CMS enables you to modify Sales Pipeline sub-statuses available from the Action menu.

The Sales Pipeline statuses are intended to track prospective business through the sales process. You can further define the Sales Pipeline by selecting a sub-status (reason).

CMS has default sub-statuses associated with each Sales Pipeline status. You can modify or remove the default sub-statuses and add custom sub-statuses to meet your agency's needs.

Sales Pipeline Configuration

See the Customizing Sub-Statuses video.

Custom Client Tag Categories

Your agency can customize a list of available Tag Categories to choose from, and designate specific categories to display as a pop-up notification. When a user opens a client file that contains a pop-up Tag, an alert displays until the user dismisses the Tag.

Custom Client Tags

Commercial Hazard Classifications and Class Codes Setup

HawkSoft CMS enables you to add commercial hazard classifications and class codes for certain Lines of Business (LOB), such as Commercial General Liability, Agricultural Liability, or Business Owners Liability. Use the **Commercial Hazard Classifications** dialog to enter or import a list of frequently used Classifications and Class Codes.

When adding a hazard to a policy, a Classification and Class Code Lookup button is available on the **Add Hazard** dialog for accessing the list of classifications entered on the Hazard Classifications dialog.

Commercial Hazard Classifications and Class Codes Setup

Workers' Compensation Classification Codes

HawkSoft CMS enables you to create and track Workers' Compensation policies, including coverage and hazard information. Workers' Compensation is included as a default line of business within Policy/Company Setup but can be customized to fit your business needs.

Workers' Compensation Classification Codes

Customizing Lists

HawkSoft CMS includes a variety of menu and drop-down lists that provide options for managing your client files and policies. This article describes how to customize the menu lists available from the Action menu and from several drop-downs throughout CMS.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

In this topic:

The following customized lists are unique. Please see the appropriate articles for customizing these lists:

Cancellation Sub-Status Setup

Sales Pipeline Configuration

Client Tags [+video]

Commercial Hazard Classifications and Class Codes Setup

Workers' Compensation Classification Codes

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Customize Lists

See Setting User Permissions for more information.

Modifying a menu list

1. Click the **Settings** icon, and then select **Customize Lists** from the main CMS menu bar.

   The **List Items Setup** dialog opens. It contains a set of menu lists that can be edited. The Location column indicates where in CMS each of the lists are located.

2. Highlight a menu to modify, and then click **Edit**.

   The **Setup** dialog for the selected menu opens with a list of menu items.

   Use the available buttons to make changes to the list. Different options are available on the Setup dialog, depending on your selection.

   New – Click to open the **Add/Edit Item** dialog.

   Enter the list item, and then click **OK**.

   Edit – Select an item from the list, and then click **Edit** to open the **Add/Edit Item** dialog.

   Modify the name of the list item, and then click **OK**.

   Delete – Select an item from the list, and then click **Delete** to remove the item from the list.

   Delete All – Select to remove all items from the list.

   > **Delete** and **Delete All** are immediate actions.

   Defaults – Click to restore the list with all default items that may have been deleted.

   When you click **Defaults**, you are presented with two options:

   - **Reset to Defaults** – Reset the list to its default state (customized items will be deleted)

     OR

   - **Load Defaults** – Update the current list to make sure all default items are included (customized items will not be deleted).

The **Default** button is not available for the following lists:

Cross-Sell/XDates

Suspense/ Log Note Templates

Types of Claims

Use the arrow buttons to organize the list according to your preferences.

3. Click **Apply** to save changes.
4. Click **OK** to close the **Setup** dialog when finished modifying a list.
5. Click **Close** when finished.

Customizable Menu List descriptions

The following table contains the customizable lists and a description of where each list is available in CMS.

Customizable Menu Lists	Description
Communication Menus (Auto, Home, Boat, MoPro, Commercial/All Other)	Communication lists contain common communication topics related to policies. This list is accessed from the Action menu. When you select an item from one of these lists, it becomes part of the log note record. For example, if you have sent an email to a client requesting updated contact information, your log entry would appear as Email > To > Insured > Communication > Name/address. Configure all policy Communication Menu Lists (Auto, Home, Boat, MoPro, Commercial/All Other) to have the same options for consistency.
T-File Menus (Auto, Home,	This list is available when T-File is selected from the

Customizable Menu Lists	Description
Boat, MoPro, Commercial/All Other)	Action menu with a policy selected. T-File (Transaction File) indicates a physical method of filing customer documents according to transaction date rather than client name. These options are used to describe the type of transaction that has been processed in CMS (for example Billing, Cancellation, etc.), and then filed using this method. Configure all T-File policy Communication Menu Lists (Auto, Home, Boat, MoPro, Commercial/All Other) to have the same options for consistency.
Action Menu From/To	Every transaction processed in CMS using the Action menu creates a log description of what prompted the transaction. For example, a transaction in response to a phone call from the insured, should be documented as Phone > From > Insured. This menu list contains descriptions of "who" prompted the transaction. This menu does not appear when processing an "Internal" transaction.
Attachment Categories	Attachments can be organized by various criteria in the client file, including Type, Category, and User. You can assign a category to an attachment when adding it to a client file or when modifying an existing attachment. See Importing and Attaching Documents to Clients and Policies.
Attachment Descriptions	These options are available from the Attachment Description drop-down list available when processing Unmatched Documents, scanning documents, or attaching documents to a client file. See Importing and Attaching Docu-

Customizable Menu Lists	Description
	ments to Clients and Policies.
Cancellation Sub-Statuses	This list includes each of the Cancellation statuses and default sub-statuses available from the Action menu. You can add additional sub-statuses as needed. See Cancellation Sub-Status Setup for detailed instructions.
Client Tag Categories	You can add or modify tag categories as needed. This list is available when adding a Client Tag from the client view screen or when adding a log note. You can also set a category to show a pop-up notification when you open a client file. See Client Tags for detailed instructions.
Cross-Sell/XDate Items	These options are available in the Type of Insurance drop-down list that appears on the Edit - Cross-Sell/XDates dialog when inserting or editing a client or policy.
Commercial Hazard Classifications	This list includes liability hazard classifications and class codes. The full list is available when adding a hazard on certain types of commercial lines of business, for example, CGL and BOPGL. The entire list can be copied from the Internet and pasted into CMS. Individual entries can be added, edited, or deleted. The Hazard Classification list is unique among the customizable lists in CMS. See Commercial Hazard Classifications and Class Codes Setup for more information.
Receipt For Items	This list includes payment items listed on the Payments dialog. This list applies to Basic Receipts only and cannot be used with Enhanced Receipts.

Customizable Menu Lists	Description
	See Basic Receipts and Enhanced Receipts for more information.
Sales Pipeline Sub-Statuses	This list includes each of the Sales Pipeline statuses and default sub-statuses available from the Action menu. You can customize the sub-statuses as needed. See Sales Pipeline Configuration for detailed instructions.
Sources	A list of sources for marketing strategies used with new clients and/or new policies. This list is available from both the Name and Address screen and the General Policy Information screen. See Client Name and Address Informationor General Policy Information for more information.
Suspense Categories	A list of Categories available for assigning to a Suspended Log. You can filter by Category when working your Suspense list. See Creating a Log Note for more information.
Suspense/Log Templates	A list of Log Note templates. Log note templates provide standardized language for log note and suspense descriptions. This list of template options is available when you click the template icon on the Add Log Entry Comments dialog.
Types of Claims	A list of claim types available from the Type of Claim drop-down list when adding or editing a claim on a policy.
Workers' Compensation Classification Codes	This list includes class codes specifically for Workers' Compensation. Any codes added to this list are available from the Class Code field on the ACORD 130 form. A list of class codes can be copied from an Excel spreadsheet and pasted into this custom list. The Workers' Compensation Clas-

Customizable Menu Lists	Description
	sification Codes list is unique among the customizable lists in CMS. See Workers' Compensation Classification Codes for more information.

Creating sub-menus for Action menu lists

You can create a sub-menu for most of the Action menu items. Providing sub-menus ensures that your log notes contain consistent documentation. See the Customizable Menu Lists table for a description of Action menu lists.

> The following Action menu lists are unique. Please see the appropriate articles for customizing these lists:
>
> Hazard Classifications and Class Codes Setup
>
> Workers' Compensation Classification Codes
>
> Cancellation Sub-Status Setup
>
> Sales Pipeline Configuration

A sub-menu must contain a minimum of two items.

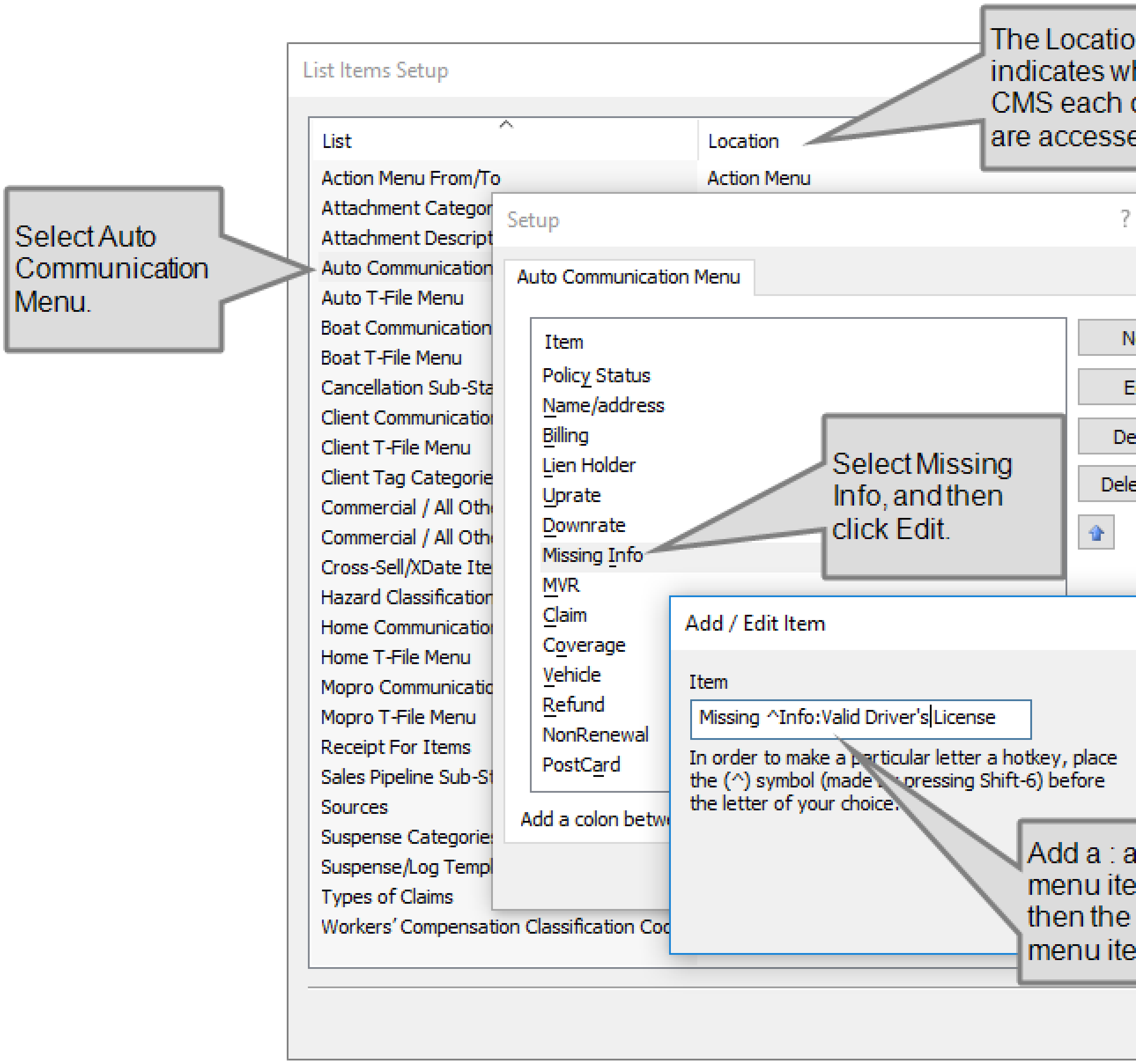
> **Example**: For the Auto Communication Menu, create a Missing Info sub-menu with, Valid Driver's License, Proof of prior, Proof of Good Student Discount, etc.

1. Click the **Settings** icon, and then select **Customize Lists** from the main CMS menu bar.

   The **List Items Setup** dialog opens. It contains a fixed set of menu lists that can be edited.

2. Highlight an Action menu list item to modify, and then click **Edit**.

For our example, choose **Auto Communication Menu**



The **Setup** dialog for the selected Action menu opens with a list of menu items.

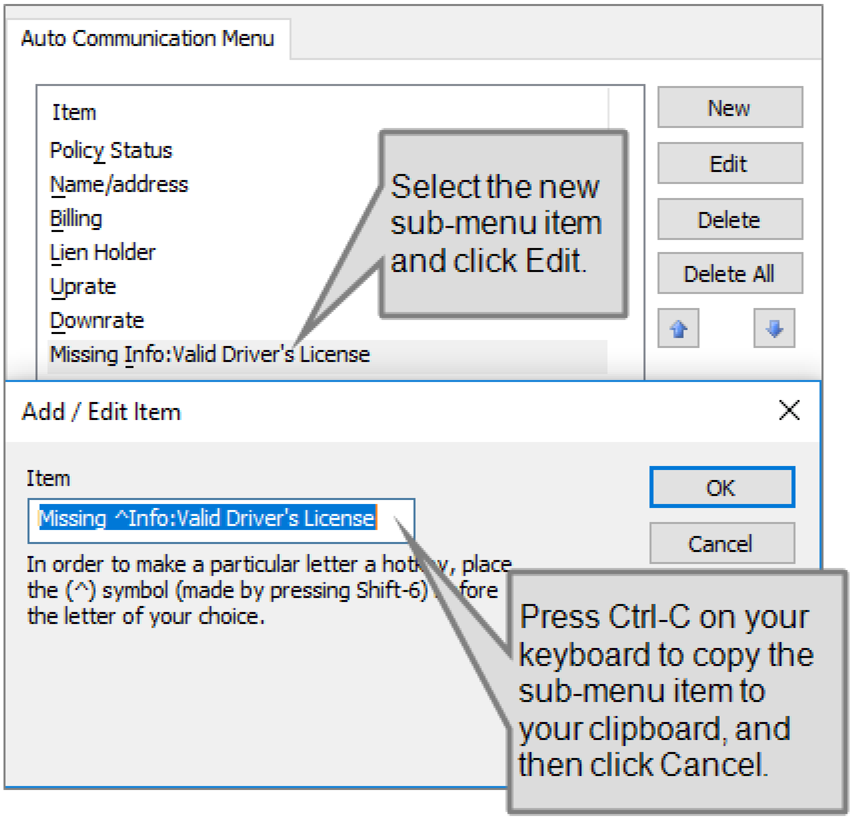
3. Click **Edit** to create a sub-menu based on an existing menu item. *See example above.*

   The **Add/Edit Item** dialog opens.

4. Enter a **:** and the sub-menu item. *See example above.*

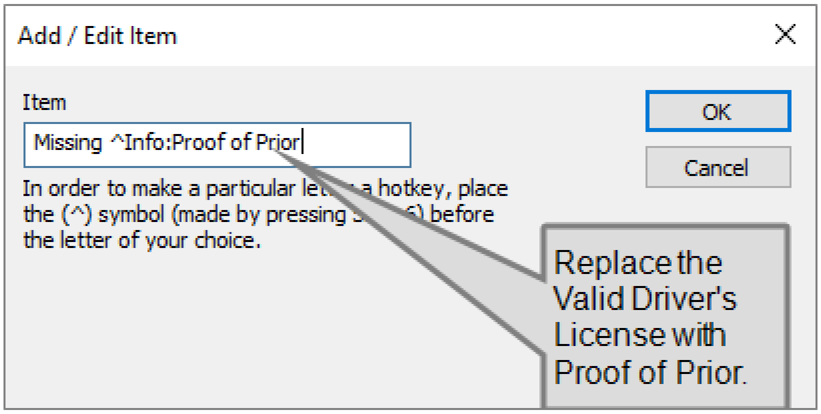
5. Click **OK** to save.

6. Select the new sub-menu item, and then click **Edit**.



7. Press **Ctrl-C** on your keyboard to copy the sub-menu item to your clipboard, and then click **Cancel**.
8. Click **New** to create the next sub-menu item.

   The **Add/Edit** Item dialog opens.
9. Press **Ctrl-V** on your keyboard to paste the sub-menu item, and then edit the sub-menu.

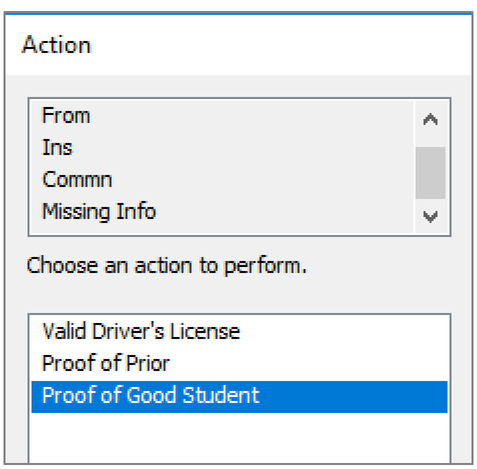


10. Click **Ok** to save.
11. Continue to add additional sub-menu items as needed. *For our example, add Proof of Good Student.*
12. Click **Apply** when all sub-menu items have been added.

> Your new sub-menu items are listed at the bottom of the menu list on the Setup dialog. You can use the  to rearrange items in the list. This will make editing the list easier in the future and will also determine the order of the sub-menu.

13. Click **OK** to close the Setup dialog.

Based on our example, the next time **Communication** > **Missing Info** is selected from the Action Menu on an Auto policy, the following sub-menu will be available:



Creating keyboard shortcuts

Using keyboard shortcuts can improve user efficiency and productivity. This functionality allows you to access list items with keyboard commands, rather than using your mouse.

1. Click the **Settings** icon, and then select **Customize Lists** from the main CMS menu bar.

   The **List Items Setup** dialog opens. It contains a fixed set of menu lists that can be edited.

2. Highlight a menu to modify, and then click **Edit**.

   The **Setup** dialog for the selected menu opens with a list of menu items.

   > List items that already have a shortcut set up are indicated with an underscore below the letter set as the shortcut.

3. Highlight the list item that you want to add a shortcut to, and then click **Edit**.

   The **Add/Edit Item** dialog opens.

4. Put your cursor in front of the letter in the word to be used as the shortcut, and then press **Shift + 6**.

   You will see the **^** character appear before the letter.

   Example: ^Driver

   This option can then be selected by pressing the **D** key, rather than using the mouse to select **Driver** from the list.

5. Click **OK** to close the **Add/Edit Item** dialog and save the shortcut.
6. Click **Apply** to save changes.
7. Click **OK** to save your changes and close the **Setup** dialog.

Related Topics

Action Menu
Cross-Sell/XDates
Log Note Templates
Processing Unmatched Documents

Cancellation Sub-Status Setup

HawkSoft CMS enables you to add additional sub-statuses to the Cancellation statuses available from the Action menu.

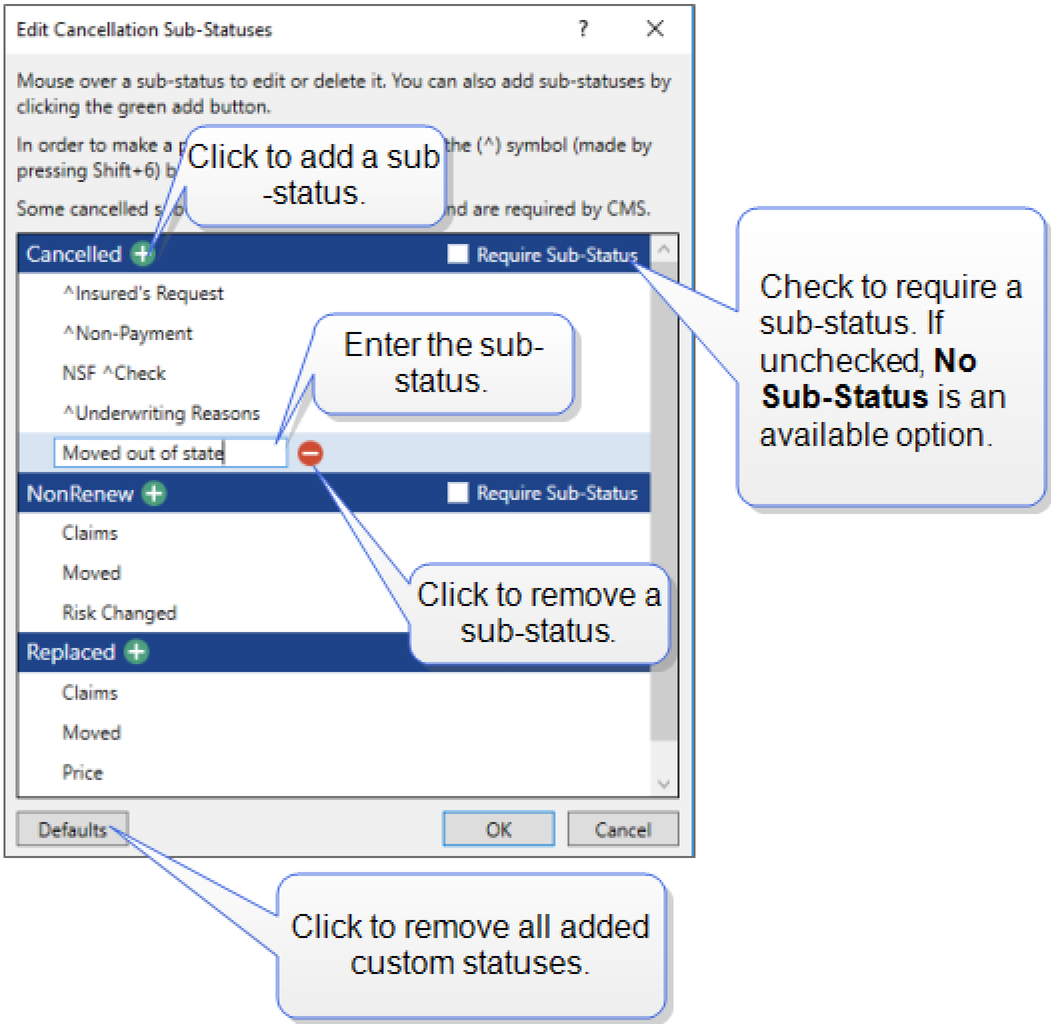
The Cancellation statuses are intended to track policies that have been canceled. The sub-statuses associated with each Cancellation status are used to further define the reasons for the cancellation.

See Policy Status for more information about the Cancellation statuses and default sub-statuses.

This article explains how to add Cancellation sub-statuses to the Action menu.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Customize Lists
>
> See Setting User Permissions for more information.

1. Click the Settings icon, and then select **Customize Lists**.
2. Select **Cancellation Sub-Statuses**, and then click **Edit**.
3. Modify the list as needed.



4. Click **OK** to save.

   You will see your saved sub-statuses next time you use the Action menu to cancel a policy.

Sales Pipeline Configuration

HawkSoft supports your agency's Sales Pipeline to help you track and report on your prospects to make sure your new policies move through the process from discovery to sold. It is important to configure HawkSoft to use the Sales Pipeline correctly, for accurate reporting.

See About The Sales Pipeline for more information.

In this topic:

Set Defaults for New Prospects	Customize the Sales Pipeline Sub-Statuses

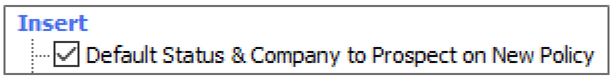
Set your defaults for new prospects

To encourage your agency to utilize the Sales Pipeline, configure your agency's General Settings to always default new policies to Prospect.

1. Click the **Settings** icon, and then select **General Configuration**.

   The **General Configuration** dialog opens, with the **General Settings** side-tab preselected.

2. Select **Default Status & Company to Prospect on New Policy**.

3. Click **OK**.

When this setting is selected, new policies will automatically have the **Policy Status** and **Company** set to *Prospect*.

> For commercial policies, make sure you have set up all of your lines of business under the Prospect Company in Policy Company Setup.

Customize the Sales Pipeline Sub-Statuses

The Sales Pipeline policy statuses are available when users insert a prospect policy and are intended to help track prospective business through the sales process. Users can further define the Sales Pipeline by selecting a sub-status.

CMS has default sub-statuses associated with each Sales Pipeline status.

HawkSoft's default Sales Pipeline statuses:

Status	Default Sub-Status	Description
Lead		Indicates possible interest. **Example**: An existing client mentions they might be purchasing a vacation home. You can enter a new Home policy with a Status of Lead and follow up with the client at a later date.

Status	Default Sub-Status	Description
	Unqualified	Client insurance needs are unknown. **Example**: A list of leads in a residential zip code.
	Qualified	Client insurance needs are known. **Example**: A mortgage broker has sent a list of recent mortgage applicants.
Prospect		The client is interested in receiving a quote. The policy has not been sold.
	Discovery	The agency is gathering information needed for underwriting and quoting.
	Submission	The agency has submitted the application to its carriers for approval and/or quote. Use Submission Tracking in CMS to track the status and details of the application. SeeTrack Submissions for more information.
	Quote	A quote/offer has been extended to the client.
	Proposal	The agency has issued a formal insurance proposal to the client.
Refused		The client declined the quote/proposal.
	Price	The client declined due to price.
	Didn't Buy Risk	The client did not proceed with purchasing the item to be insured.
Rejected		The policy has been disqualified.
	U/W Rejected	The Underwriter rejected the client's application.
	Agency Disqualified	The policy doesn't meet the agency's standards.

To add and remove Sales Pipeline sub-statuses to the Action menu

You can modify or remove the default sub-statuses and add custom sub-statuses to meet your agency's needs.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Customize Lists
>
> See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Customize Lists**.
2. Select **Sales Pipeline Sub-Statuses** and then click **Edit**.
3. Modify the list as needed.

4. Click **OK** to save.

   You will see your saved sub-statuses next time you use the Action menu Sales Pipeline.

Related Topics

[About The Sales Pipeline](#)
[Insert a Prospect: Sales Pipeline](#)
[Sales Pipeline Reports](#)

Custom Client Tags

Client Tags can be applied to a client file to serve as a notification to any user that opens that client file. For example, you might want to add a Tag to indicate that the client speaks Spanish, is a VIP customer, or you might want to alert any user that the client has a returned check for non-sufficient funds.

Your agency can customize a list of available Tag Categories to choose from, and designate specific categories to display as a pop-up notification. When a user opens a client file that contains a pop-up Tag, an alert displays until the user dismisses the Tag.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Customize Lists
>
> See Setting User Permissions for more information.

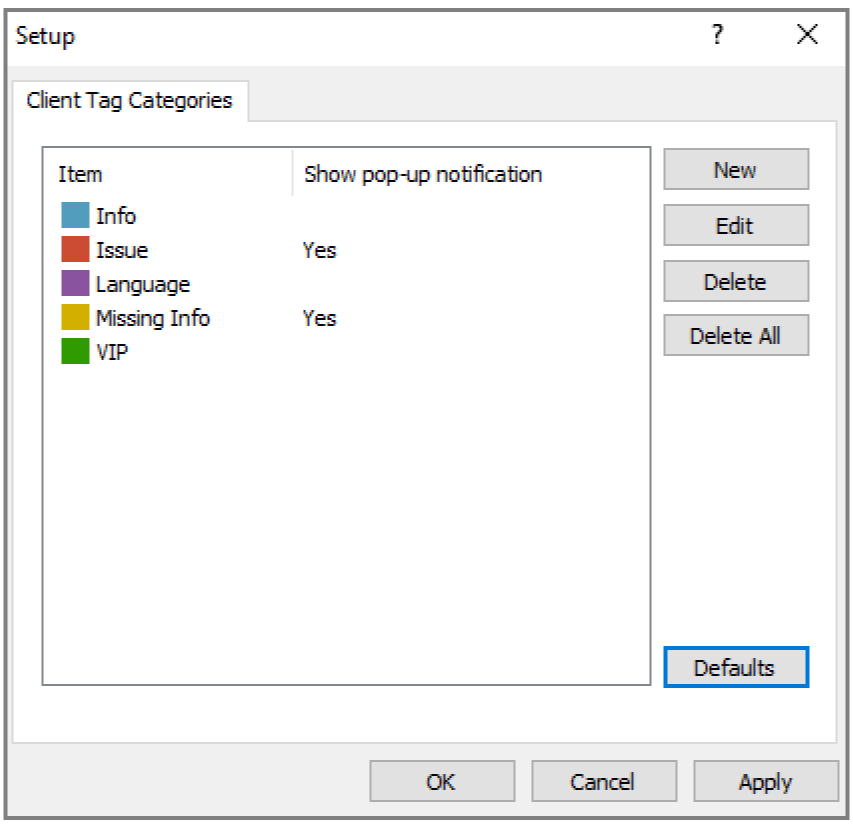
1. Click the **Settings** icon, and then select **Customize Lists** from the main CMS menu bar.

   The **List Items Setup** dialog opens.

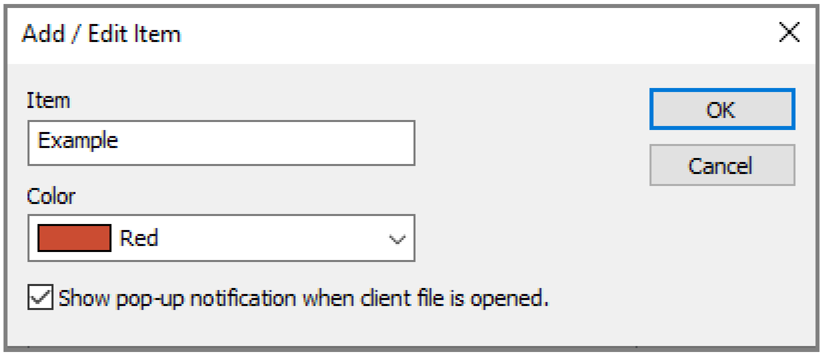
2. Select **Client Tag Categories**, and then click **Edit**.

   The **Setup** dialog opens with a list of Client Tag Categories.

   The following Categories and pop-up notifications are included by default.



   Use the available buttons to add, modify, or remove Client Tag Categories.



Item – Enter the Category, and then click **OK**.

To create a blank Category, enter spaces in the **Item** field.

Color – Select a color for the Category. All Tags entered for this Category will be associated with the selected color.

Pop-up – Check the box if all Tags with Category should display as a pop-up alert.

Delete/Delete All – If you delete a Category, it is removed immediately.

Defaults – Click to restore the list with all default items that may have been deleted.

- **Reset to Defaults** – Reset the list to its default state (customized items will be deleted)

  OR

- **Load Defaults** – Update the current list to make sure all default items are included (customized items will not be deleted)

3. Click **Apply** to save changes.
4. Click **OK** to close the **Setup** dialog.
5. Click **Close**.

Related Topics

Client Tags [+video]
Customizing Lists

Commercial Hazard Classifications and Class Codes Setup

HawkSoft CMS enables you to add commercial hazard classifications and class codes for certain Lines of Business (LOB), such as Commercial General Liability, Agricultural Liability, or Business Owners

Liability. Use the **Commercial Hazard Classifications** dialog to enter or import a list of frequently used Classifications and Class Codes.

When adding a hazard to a policy, a Classification and Class Code Lookup button is available on the **Add Hazard** dialog for accessing the list of classifications entered on the Hazard Classifications dialog.

This article explains how to set up your Commercial Hazard Classifications list.

See Hazards for more information on adding hazards to a policy.

In this topic:

Import Hazard Classifications and Class Codes	Manually Add Classifications and Class Codes	Remove a Hazard

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Customize Lists

See Setting User Permissions for more information.

To import hazard classifications and class codes

1. Select the **Settings** icon, and then select **Customize Lists**.

   The **List Items Setup** dialog opens.

2. Select **Commercial Hazard Classifications**, and then click **Edit**.

   The **Hazard Classifications** dialog opens.

3. Copy the classification list from your desktop or online source.
4. Click **Import from Clipboard** on the Hazard Classifications dialog.

   How CMS Imports Hazard Classifications and Class Codes...

5. Click **OK** to save, and then click **Close**.

The hazard classifications and codes are now available to be added on the Hazards screen.

To manually add a classification and class code

1. Select the **Settings** icon, and then select **Customize Lists**.

   The **List Items Setup** dialog opens.

2. Select **Commercial Hazard Classifications**, and then click **Edit**.

   The **Hazard Classifications**dialog opens.

3. Scroll to the bottom of the Classification list, and then manually enter the name of the **Classification** and the **Class Code**.

   An additional blank line is created.

4. Enter additional classifications, as needed.
5. Click **OK** to save, and then click **Close**.

The hazard classifications and codes are now available to be added on the Hazards screen.

To remove a hazard from the list

Highlight the hazard to be removed, and then click **Delete Row**.

To remove multiple hazards, press and hold the **Ctrl** key while selecting the hazards to be removed, and then click **Delete Row**.

Related Topics

Coverages for Commercial and Other Policy Types
Customizing Lists
Hazards

Workers' Compensation Classification Codes

HawkSoft CMS enables you to create and track Workers' Compensation policies, including coverage and hazard information. Workers' Compensation is included as a default line of business within Policy/Company Setup but can be customized to fit your business needs.

This article explains how to set up your Workers' Compensation Classification Codes list in CMS.

See Workers' Compensation to learn how to add or edit policies, andWorkers' CompensationCreating and Modifying an ACORD Form for more information on generating forms in CMS.

In this topic:

Import Workers' Comp Class Codes	Manually Add Workers' Comp Class Code	Remove Workers' Comp Class Code

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Customize Lists

See Setting User Permissions for more information.

To import Workers' Comp class codes

You can easily copy and import a list of class codes from an Excel spreadsheet, directly into the Workers' Compensation Classification Codes dialog in CMS.

1. Copy the Classification codes and descriptions from your Excel spreadsheet to your clipboard.

   For easy importing, format your list of class codes in your Excel® spreadsheet with the code in the first column and the description in the second column.

2. In CMS, click the **Settings** icon, and then select **Customize Lists**.

   The **List Items Setup** dialog opens.

3. Select **Workers' Compensation Classification Codes**, and then click **Edit**.

The **Workers' Compensation Classification Codes** dialog opens.

4. Click **Import from Clipboard**.

To manually add a Workers' Comp class code

1. Select the **Settings** icon and then select **Customize Lists**.

   The **List Items Setup** dialog opens.

2. Select **Workers' Compensation Classification Codes**, and then click **Edit**.

   The **Workers' Compensation Classification Codes** dialog opens.

3. Enter a **Class Code** and a **Description**.

To remove a Workers' Comp class code

1. Select the **Settings** icon and then select **Customize Lists**.

   The **List Items Setup** dialog opens.

2. Select **Workers' Compensation Classification Codes**, and then click **Edit**.

   The **Workers' Compensation Classification Codes** dialog opens.

3. Select a **Class Code** from the list, and then click **Delete Row**.

Related Topics

Coverages for Commercial and Other Policy Types
Creating and Modifying an ACORD Form
Customizing Lists
Workers' Compensation

Correspondence Setup Overview

HawkSoft CMS provides a variety of ways in which users can correspond with customers, prospects, and other contacts entered into the CMS database.

Emails, letters, memos, proposals, the Policy Overview, and text messages can be conveniently created, and then printed and/or sent from the client files using the Action menu. Data from client files can be inserted into correspondence using merge fields.

Some template setup is necessary to get the most from the correspondence features. These templates are found in **Setup** > **Correspondence Templates** on the main CMS menu bar. For more information, see the linked articles in the sections below.

Base Templates

HawkSoft CMS has default base templates which provide the default layout and formatting for creating new email and form letter templates created in CMS, and serve as the actual templates for memos and the Policy Overview printed through CMS.

The base templates can be modified to meet the needs of your agency. For example, you can set up the Base Email Template to always include the customer's name and policy number in the Subject line using merge fields. When creating a new email template, those merge fields will already be included on the template, saving you time.

See the articles listed below to create your specific correspondence templates, using the CMS Base Templates.

> The Policy Overview Summary and Memo Base Templates are not used to create additional templates. Your agency will use the Policy Overview and Memo Base Templates when printing these correspondence types.

Base Templates

Form Letter Templates

HawkSoft CMS enables you to create form letter templates for printing customized letters to meet agency correspondence needs. This article describes how to create and modify form letter templates.

Form Letter Templates

Proposal Templates

Proposals can consist of cover letters and post letters, line of business descriptions, and any attachments or photos that the user chooses to include. All proposal templates are created using the layout and formatting of the Base Form Letter Template.

Proposal Templates

Email Templates

HawkSoft CMS enables you to create email templates for composing standardized emails to send to clients. All email templates use the layout and formatting of the Base Email Template.

This article describes how to create and modify email templates.

Email Templates

Modifying Email Templates

HawkSoft CMS text messaging templates provide users with the tools to create standardized text messages that can be sent to individual recipients. Merge fields can be added for inserting client/policy information for more personalized messages.

Modifying Email Templates

Text Messaging Templates

Agencies can create templates that will merge information from client and policy files into a text message.

Text Message Templates

E-Signature Templates

HawkSoft CMS enables you to create templates for composing standardized e-signature messages to send to clients with documents to be signed. Each template can include a subject and message content, as well as attached standard documents.

E-Signature Templates

Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)

HawkSoft CMS enables you to make formatting changes and insert merge fields, signatures, and other elements into your letter, memo, proposal, and the Policy Overview templates.

Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)

Importing and Exporting Correspondence Templates

HawkSoft CMS enables you to share Correspondence Templates with HawkSoft users outside of your agency, as well as third-party sources, such as a drip marketing vendor. This topic provides instructions for exporting templates out of your database *to* your local computer, and importing templates *from* your local computer.

Importing and Exporting Correspondence Templates

Base Templates

HawkSoft CMS has default base templates which provide the default layout and formatting for creating new email and form letter templates created in CMS, and serve as the actual templates for memos and the Policy Overview printed through CMS.

The base templates can be modified to meet the needs of your agency. For example, you can set up the Base Email Template to always include the customer’s name and policy number in the Subject line using merge fields. When creating a new email template, those merge fields will already be included on the template, saving you time.

HawkSoft CMS comes with four default base template types that can be edited to suit your agency’s needs:

Base Email Template	Provides the basic formatting for all email templates.
CMS Form Letters	Provides the basic formatting for all form letter and proposal templates.
Memos	Provides the layout for the three memo formats available in CMS: Memo to Additional Interests, Memo to Company, Memo to Insured. You don't need to create an additional memo template.
Policy Overview	This is a simplified summary of the policy that describes the carrier, lines of business, coverages, and effective dates for a policy. This template determines how the Policy Overview will appear when printed from a policy. You don't need to create an additional Policy Overview template.

In this topic:

This task is typically performed by an Owner/Administrator or Manager.

Because Email and Letter Base Templates provide the starting point for any new email and letter templates, they should be configured to fit general correspondence needs. For more information on creating specific correspondence templates, please see the Correspondence Setup Overview.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

Modifying the default Base Email Template

This template provides the layout and formatting for all new email templates created in CMS.

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select **Base Templates**.

   The list of Base Templates is displayed.

3. Select **Base Email Template**, and then click **Edit**.

   The **Email Template Editor** displays the default merge fields and layout for this template.

4. Format the template according to your agency preferences.

    a. Select the **HTML** or **Plain Text** option from the template editor icon bar.

    > Users who have enabled MAPI email configuration can only send Plain Text messages, because MAPI is incompatible with HTML. See Email Templates for more information.

    b. Add text, merge fields, hyperlinks, and images, as needed.

    For information on formatting text and inserting merge fields, images/agency logos, and objects, see Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview).

    c. Format text fields.

    This might include changes to the font, font size, color, or other text effects (bold, underlined, etc.).

5. When all changes have been made, click **Save**, and then close the template.

Modifying Form Letter, Memo, and Policy Overview Base Templates

These templates provide the layout and formatting for new form letter templates created in CMS, as well as the Memos and the Policy Overview printed through CMS.

All of these correspondence templates use the CMS Letter Editor. The basic formatting features are the same for all three.

See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information.

1. Click the **Settings** icon, and then select **Correspondence Templates**.

    The **Correspondence Templates** dialog opens.

2. Select **Base Templates**.

    The list of Base Templates is displayed.

3. Select a template, and then click **Edit**.

The CMS Letter Editor displays the default merge fields and layout for the template.

4. Format the template as needed.

   For information on formatting text and inserting merge fields, images/agency logos, and objects, see Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview).

5. When all changes are made, click **Save & Close**.

Restoring a default Base Template

You can reset a modified base template back to the original template installed with CMS.

1. Select a Base Template from the list.
2. Click **Reset**, and then select **Yes** to confirm.

   A confirmation message appears.

3. Click **Yes** to replace the modified template with the original template.

Related Topics

Correspondence Setup Overview
Email Templates
Form Letter Templates
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)
Proposal Templates
Text Message Templates

Form Letter Templates

HawkSoft CMS enables you to create form letter templates for printing customized letters to meet agency correspondence needs.

This article describes how to create and modify form letter templates.

This task is typically performed by an Owner/Administrator or Manager.

To get you started, all form letter templates use the layout and formatting of the Base Form Letter Template. You can also create a template based on an existing Word document.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

In this topic:

Access Form Letter Templates	Editing a Form Letter Template
Categorizing Your Templates	Form Letter Templates

To access the Form Letter Templates

Click the **Settings** icon, and then select **Correspondence Templates**.

The **Correspondence Templates** dialog opens with the **Form Letters** tab selected.

Adding a form letter template

You can create a new template using the default Base Templates, or if you already have a Word document created outside of CMS, you can copy and paste the document to create a template.

Create a new template from a Base template

1. Click the **Add** button.

   Each new form letter template contains the layout saved in your CMS Form Letters Base Template. See Base Templates to modify, if needed.

2. Complete the **Name of Letter** field, and then click **OK**.

   The **CMS Letter Editor** displays the Base Template.

3. Type and format the letter contents, as needed, to create the new Form Letter Template.

   See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information on adding merge fields, images, logos, etc.

   > When you have created several letter templates, these templates can be sorted into categories, for example, "Personal Lines" or "Commercial", to enable quick retrieval of specific templates.

4. Click **Save & Close**.

   The Form Letter template is now ready to use.

Create a new template from an existing Word document

1. Open File Explorer and navigate to your Word document.
2. Right-click on the Word document and click **Copy**.
3. Return to the **Correspondence Templates** dialog and right-click in the list of Form Letters templates, and then select **Paste**.

   The new template appears in the list and keeps the title of the original Word document.

4. Optional: Highlight the new template and click **Rename** to change the template description, and then click **OK**.
5. Optional: Click **Edit** to modify the template. See detailed steps below.

> When you have created several letter templates, these templates can be sorted into categories, for example, "Personal Lines" or "Commercial", to enable quick retrieval of specific templates.

Once your form letter templates have been added, you can create form letters from a client file or from a report.

Editing a form letter template

Select a form letter template from the list, and then use the following buttons as needed:

Edit – Click to open the CMS Letter Editor and modify the template as needed, and then click **Save and Close**.

See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information.

> Each correspondence template is created from a base template. See Base Templates to modify the default CMS Form Letter base template, if needed.

Rename – Click to enter a new template description.

Duplicate – Click to copy the template and enter a new description for the copy.

Remove – Click to delete the template.

Categorizing your templates

Create template categories to help organize your form letter templates. Once created, these categories are available for the entire agency.

Example: You may want to group together all letters pertaining to Personal Lines, Commercial Lines, etc.

To create a new category

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Click **New**.
3. Enter a Category name, and then click **OK**.

Assign or remove templates

Each template is listed with a check box. Select each template to be included in the selected Category.

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Select a **Category** from the drop-down.

3. Check each box next to the templates to be included in the selected category.

When creating a letter using the Action menu, users can filter templates by category to quickly find the right template to use for the new letter.

Importing and exporting form letter templates

HawkSoft includes the ability to import form letter templates into CMS from your local files, as well as export existing templates to your local files. This enables you to use templates from other sources, as well as send your agency's templates to other HawkSoft agencies.

See Importing and Exporting Correspondence Templates for detailed steps.

Related Topics

Base Templates
Batch Mailing (Print)
Form Letters
Importing and Exporting Correspondence Templates
Microsoft Word Form Letters
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)

Proposal Templates

Proposals can consist of cover letters and post letters, line of business descriptions, and any attachments or photos that the user chooses to include. All proposal templates are created using the layout and formatting of the Base Form Letter Template.

See Proposals for information on creating and printing proposals based on the Proposal Template.

This task is typically performed by an Owner/Administrator or Manager.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

CMS includes three types of templates that are used together to create a complete proposal template.

- **Cover Letter** – A basic letter template.

  Each new Cover Letter template contains the layout saved in your Form Letter Base Template. See Base Templates to modify, if needed.

- **Post Letter** – The post letter is blank by default and is fully customizable.
- **Line of Business** – The lines of business in a proposal template include the ACORD Terms and Definitions, where applicable, and coverage, hazard, and schedule merge fields to insert data from client or policy files.

Multiple versions of each type of template type can be created.

For efficiency, HawkSoft, Inc. recommends adding templates for each line of business that your agency might need before attempting to create a proposal for a client.

For LOBs with hazards or schedules, templates must contain merge fields for that information to be included.

Adding a proposal template

To create a proposal template for lines of business with hazards and/or schedules, see below.

1. Click the Settings icon, and then select **Correspondence Templates**.
2. Select the **Proposals** tab.
3. Click **Add**.

   The **Add Proposal Template** dialog opens.
4. Select **Cover Letter**, **Post Letter**, or a specific **Line of Business** from the **Select a Line of Business** drop-down list.
5. Enter a **Proposal Template Description** for the item selected in the drop-down. The description should include the type of proposal this template will be used for. For example, you could create a cover letter, line of business, and post letter that is specifically tailored to a niche you are targeting such as Attorneys, Restaurants, or Janitorial Services.
6. Click **OK**.

   The **CMS Letter Editor** opens the selected template.

   - **Cover Letter** – The CMS Base Form Letter Template is displayed.
   - **Line of Business** – Depending on the coverage, the template may contain a list of the ACORD Terms and Definitions (where applicable), as well as a merge field to insert a list of coverages for that line of business.

     To add hazards and schedules to a Line of Business template, see below.

     Some lines of business, such as Business Automobile, have state-specific templates. In this case, a second **Select Template** menu will appear. Click the drop-down arrow and select the appropriate state for the selected line of business.
   - **Post Letter** – A blank CMS Letter Editor is displayed. Make formatting changes according to agency preferences. You can add text, agency logo, merge fields, and objects.

7. Edit each of the items, as needed.

   See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information.

8. Click **Save & Close** to save each new item.

   > When you've created several letter templates, these templates can be sorted into categories, for example, "Restaurants" or "Contractors", to enable quick retrieval of specific templates.

9. When all items have been added to your proposal template, click **Close**.

Adding Hazards or Schedules to an LOB Proposal Template

1. Click the **Settings** icon, and then select **Correspondence Templates**.
2. Click the **Proposals** tab.
3. Click **Add**.

   The **Add Proposal Template** dialog opens.

4. Select a specific **Line of Business** from the **Select a Line of Business** drop-down list.
5. Enter a **Proposal Template Description** for the item selected in the drop-down.

   The description should include the type of proposal this template will be used for. For example, you could create an LOB template for Inland Marine that includes a detailed list of scheduled items, and then create another template that includes a summary list.

6. Click **OK**.

   The **CMS Letter Editor** opens the selected Line of Business template.

   Depending on the line of business, the template may contain a list of the ACORD Terms and Definitions (where applicable), as well as a merge field to insert a list of coverages for that line of business.

7. Insert merge fields to add a hazard and/or schedule list to the template.
    a. Place your cursor in your template where you want the hazard or schedule information to appear.
    b. Click **Insert** > **Field**.

        The **Select Merge Field to Insert** dialog opens.
    c. Use the **Filter Fields** box to locate Hazard or Schedule fields.
    d. Select the **Detail List**, or the **Summary List** for the schedules and/or hazards, and then click **Insert**.

        The **Merge Field Properties** dialog opens.
    e. Leave the **Line of Business** default to **All Lines of Business**.

        You already selected an LOB in step 4.
    f. Use the check boxes to select information to be included.

        Depending on the selected merge field, different check boxes will be available.
    g. Optional: Select a color for the **Header Text** and **Header** background as you want it to appear on the correspondence.
    h. Click **OK**.
8. Click **Close** when you are done inserting merge fields.
9. Click **Save & Close** to save the template.
10. When all items have been added to your proposal template, click **Close** to exit the Correspondence Templates dialog.

Editing an existing proposal template

1. Click the **Settings** icon, and then select **Correspondence Templates**.

    The **Correspondence Templates** dialog opens.
2. Click the **Proposals** tab.

3. Select a proposal template item from the list, and then use the following buttons as needed:

   Edit – Click to open the CMS Letter Editor and modify the template as needed, and then click **Save and Close**.

   See Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information.

   > Each correspondence template is created from a base template. See Base Templates to modify the default CMS Form Letter base template, if needed.

   Rename – Click to enter a new template description.

   Duplicate – Click to copy the template and enter a new description for the copy.

   Remove – Click to delete the template.

Importing and exporting proposal templates

HawkSoft includes the ability to import proposal templates into CMS from your local files, as well as export existing templates to your local files. This enables you to use templates from other sources, as well as send your agency's templates to other HawkSoft agencies.

For full steps on importing and exporting proposal templates, see Importing and Exporting Correspondence Templates.

Related Topics

Base Templates
Form Letter Templates
Importing and Exporting Correspondence Templates
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)
Proposals

Email Templates

HawkSoft CMS enables you to create email templates for composing standardized emails to send to clients. All email templates use the layout and formatting of the Base Email Template.

This article describes how to create and modify email templates.

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Correspondence Templates
>
> See Setting User Permissions for more information.

In this topic:

To access the email templates

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **Email** side-tab.

Adding an email template

1. Click the **Add** button.
2. Name the template, and then click **OK**.

   The **Email Template Editor** opens.

> Each new Email template contains the layout saved in your Email Base Template. See Base Templates to modify, if needed.

3. Select the **HTML** or **Plain Text** option.

   HTML Language allows format options such as different fonts, bold, italics, underlined print, bullet points, and inserting merge fields, images, and hyperlinks.

   Plain Text offers fewer formatting options, however, all CMS merge fields can be inserted into a plain text email template.

   > MAPI (Messaging Application Programming Interface) is NOT compatible with HTML. When Email integration is set to use MAPI, and HTML-formatted email template (including the "No Template" option) is selected, the following message appears in a yellow bar at the bottom of the New Message window:
   >
   > "Your current email setting does not support HTML emails. All HTML formatting has been removed from the loaded template."
   >
   > The recipient will receive a Plain Text email.
   >
   > Email integration settings are located on the **Email** side-tab in the **User Profile**. See User Email Setup for more information.

4. Enter a subject for the email template.

5. Optional: Check **Request Read Receipt** to receive confirmation when an email created from this template is sent and received.

   > This option cannot be seen or changed when creating an email based on this template. If this option is selected, a confirmation email will be returned to the user from each email recipient including batch email, which could result in a large number of confirmations returned. You can create two identical email templates, one with this option selected and one without. Indicate "confirmation" in the template title.

6. Delete **<<Body of Letter>>** and replace with the content of your message.

7. Modify and format the email template as needed.

See Modifying Email Templates for information on inserting merge fields and images.

8. When finished, click **Save**.
9. Click the **X** in the upper right hand corner to close.

> When you have created several email templates, these templates can be sorted into categories, for example, "Personal Lines" or "Commercial", to enable quick retrieval of specific templates.

10. Click **Close** to exit Correspondence Templates.

Editing an email template

Select a template from the list, and then use the following buttons as needed:

Edit – Click to open the Email Template Editor and modify the template as needed.

Click **Save**, and then click the **X** in the upper right hand corner to close.

See Modifying Email Templates for more information.

> Each correspondence template is created from a base template. See Base Templates to modify the default Email template, if needed.

Rename – Click to enter a new template description.

Duplicate – Click to copy the template and enter a new description for the copy.

Remove – Click to delete the template.

See Base Templates to modify the base template for your agency's email templates.

Categorizing your templates

Create template categories to help organize your email templates. Once created, these categories are available for the entire agency.

Example: You may want to group together all emails pertaining to Personal Lines, Commercial Lines, etc.

To create a new category

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Click **New**.
3. Enter a Category name, and then click **OK**.

Assign or remove templates

Each template is listed with a check box. Select each template to be included in the selected Category.

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Select a **Category** from the drop-down.
3. Check each box next to the templates to be included in the selected category.

When creating an email using the Action menu, users can filter templates by category to quickly find the right template to use for the new letter.

Importing and exporting email templates

HawkSoft includes the ability to import email templates into CMS from your local files, as well as export existing templates to your local files. This enables you to use templates from other sources, as well as send your agency's templates to other HawkSoft agencies.

See Importing and Exporting Correspondence Templates for detailed steps.

Related Topics

Base Templates
Batch Emails

Correspondence Template Properties
Email
Importing and Exporting Correspondence Templates
Modifying Email Templates
User Email Setup

Modifying Email Templates

HawkSoft CMS enables you to make formatting changes and insert merge fields, logos, and other elements into your email templates.

See Communications Overview and Correspondence Setup Overview for more information about the different types of correspondence in CMS, and how to create and use templates.

- **Letter, Memo, Proposal, and the Policy Overview** – To modify correspondence templates, see Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview).
- **Text Messaging** – To format a text message template, see Text Message Templates.

This article describes the various formatting options available when modifying email templates within CMS.

See Email Templates for instructions on creating or modifying Email templates.

In this topic:

Adding Merge Fields	Adding Images/Logos	Adding Website Links

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

How do I get here?

An Email Template Editor is available when creating or modifying an email template in CMS. The following steps assume you have the editing window open.

Adding merge fields

Merge fields are used to insert information from client or policy files into email templates as well as all other correspondence at the time it is generated. For example, you can insert a merge field to include a policy number or carrier name in correspondence.

> Some field selections activate the **Merge Field Properties** dialog. Follow on-screen prompts to insert the field.

1. With the Email Template Editor open, position your cursor where the merge field information should appear, and then click **Insert** > **Field** from the editing menu bar.

   The **Select Merge Field to Insert** dialog opens.

2. Select a field from the list.

   > Use the **Filter Fields** and **Filter Category** to quickly find a field name.

3. Optional: If available, select a capitalization format for the field from the **Formatting** drop-down list.

   - **Proper Case** – The first letter of each word is capitalized.
   - **Upper Case** – All letters are capitalized.
   - **Lower Case** – All letters are lower case.

4. Click **Insert**.

   The merge field is inserted and the dialog stays open to add more fields if necessary.

5. Reposition your cursor to insert another merge field, as needed.
6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all fields have been inserted.

Adding User Input fields

A User Input field provides a "placeholder" for the user to enter information that cannot be automatically merged from a CMS client or policy. These fields are typically added to form letter templates. When a user selects a form letter that contains a User Input field, they are prompted to insert specific information before printing the letter.

> User Input fields should not be placed in form letters intended for mass mailings.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Field**.

   The **Select Merge Field to Insert** dialog box opens.

2. Select **User Input** from the Field list.
3. Enter the expected user input in the **Description** field at the bottom of the dialog.

   Example: If you enter "**Need By**" in the Description field, this description appears as a prompt to the user.

4. Click **Insert**.

   The merge field is inserted and the dialog stays open to add more fields if necessary.

5. Optional: Reposition your cursor to insert another Input field, as needed.

   With the User Input field selected, you can change the Description, and then click **Insert**.

6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all input fields have been inserted.

Formatting merge fields

Edit the font, font size, or color

1. Highlight the entire field, including chevrons: <<text>>.
2. Modify the field, as needed.

   Use the Format menu or toolbar icons to apply formatting and edit the font, font size, or color.

Delete a merge field

1. Highlight the entire field, including chevrons: <<text>>.
2. Press **Delete** on your keyboard.

Adding images/logos to email templates

Inserting an image into an email does not insert the actual image. The image URL (address) is added to the email. When the email is received, the computer must access the Internet and download the image into the email. Images stored on a computer or internal intranet will not be seen by the email recipient.

Pasting images into a CMS Email is not currently supported.

1. With the Email Template Editor open, position your cursor, and then click **Insert** > **Image**.

   The **Image URL** dialog opens.
2. Enter the image URL.
3. Click **OK**.

Adding website links to an email template

You can use any text or an image to create a clickable link to a website.

See above for steps to add an image, and then follow the steps below to create a link for your image.

1. With the Email Template Editor open, highlight the text or image to be used for the link.

   > You can use your mouse to click-and-drag to highlight text or an image. Alternatively, you can click next to an image, then use Shift+Arrow Key to highlight it. If your image is selected, it will be highlighted in blue.

2. Click **Insert** > **Hyperlink**.

   The **Hyperlink** dialog box opens.

3. Select the hyperlink type from the **Type** drop-down list.
4. Enter the web address in the **URL** field.
5. Click **OK**.

Click **Save**, and then click the X to close the Email Template Editor when all changes are made.

Related Topics

Correspondence Setup Overview
Text Messaging with Email-to-SMS Services
Text Message Templates

Text Message Templates

HawkSoft CMS text messaging templates provide users with the tools to create standardized text messages that can be sent to individual recipients. Merge fields can be added for inserting client/policy information for more personalized messages.

Text messages are limited to 160 characters. Messages exceeding this limit may be cut off, or sent as separate messages. When using merge fields, the actual character count of the text message sent will vary depending on the data merged. Be sure to consider the potential character count when creating your text message templates.

HawkSoft provides two options for texting your clients: HawkSoft Texting or Texting via email-to-SMS. Once text messaging is configured for your agency, the Text Message templates are accessed from the Action menu.

In this topic:

This task is typically performed by an Owner/Administrator or Manager.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

To access the text message templates

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **Text Messaging** side-tab.

Adding a text message template

1. Click **Add** to open the **Edit Text Message Template** dialog.
2. Enter a **Template Name**.
3. Enter your message in the **Text Message Template** field.
4. Optional: Add merge fields.
    a. Place your cursor in the Template Name field and/or the Text Message Template box where you want the merge field to appear, and then click

    Insert Merge Field button.

    The **Select Merge Field to Insert** dialog opens.

    Select a merge field from the list, and then click **Insert**.

    b. Repeat, to add additional merge fields.

    > The client/policy data will be merged when the text message is created

5. When the text message template is complete, click **OK**.

    The new template is displayed in the **Template Name** list.

6. Click **Close** to exit the **Correspondence Templates** dialog.

When you've created several Text Message templates, these templates can be sorted into categories, for example, "Personal Lines" or "Commercial", to enable quick retrieval of specific templates.

Editing a text message template

Select a template from the list, and then use the following buttons as needed:

Edit – Click to open the Edit Text Message Template dialog and modify the template as needed, and then click **OK**.

See Adding a text message template for more information on inserting merge fields.

Rename – Click to enter a new template description.

Duplicate – Click to copy the template and enter a new description for the copy.

Remove – Click to delete the template.

With your text message template complete, your agency will be able to send consistently formatted text messages to your contacts.

Categorizing your templates

Create template categories to help organize your text message templates. Once created, these categories are available for the entire agency.

Example: You may want to group together all text messages pertaining to Personal Lines, Commercial Lines, etc.

To create a new category

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Click **New**.
3. Enter a Category name, and then click **OK**.

Assign or remove templates

Each template is listed with a check box. Select each template to be included in the selected Category.

1. Click the **Categories** button.

   The **Category Setup** dialog opens.

2. Select a **Category** from the drop-down.
3. Check each box next to the templates to be included in the selected category.

When creating a text message using the Action menu, users can filter templates by category to quickly find the right template to use for the new letter.

Importing and exporting text message templates

HawkSoft includes the ability to import text message templates into CMS from your local files, as well as export existing templates to your local files. This enables you to use templates from other sources, as well as send your agency's templates to other HawkSoft agencies.

See Importing and Exporting Correspondence Templates for detailed steps.

Related Topics

Correspondence Template Properties
Importing and Exporting Correspondence Templates
Text Messaging Overview
Text Messaging with Email-to-SMS Services
Text Messaging Setup

E-Signature Templates

HawkSoft CMS enables you to create templates for composing standardized e-signature messages to send to clients with documents to be signed. Each template can include a subject and message content, as well as attached standard documents.

See E-Signature Overview for more information about e-signature options.

Templates can be selected and modified when sending documents for electronic signature.

This article describes how to create and modify e-Signature templates.

This task is typically performed by an Owner/Administrator or Manager.

In this topic:

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

Adding an E-Signature template

1. Click the **Settings** icon, and then select **Correspondence Templates**.
2. Click the **E-Signature** tab.
3. Click **Add**.

   The **Edit E-Signature Template** dialog opens.
4. Enter a **Template Name**.
5. Optional: Enter a **Subject** line that will appear on the message when this template is selected.

   Optional: Place your cursor within the subject, and then click Insert Merge Field.

   If the Subject is left blank, the user can enter a subject before sending the message with the documents to be signed.
6. Type the **Message** to be sent when this template is selected.

   You can click to use the spell check.

   Optional: Place your cursor within the message, and then click Insert Merge Field.
7. Optional: You can **Attach Documents** that will be included when this template is used. For example, a disclaimer, agency questionnaire, or a supplemental information form.

   Attached documents can be removed before sending, if needed.

   Check with your e-signature provider for supported file types.
8. Click **OK** to save and close.

9. Click **Close** to exit Correspondence Templates.

Editing an E-Signature template

1. Click the **Settings** icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **E-Signature** side-tab.
3. Select a template from the list, and then use the following buttons as needed:

Edit	Click to open the **Edit E-Signature Template** dialog and modify the template as needed, and then click **OK**. See steps 5 through 7 above to modify the subject, message, or attachments.
Rename	Click to enter a new template description.
Duplicate	Click to copy the template and enter a new description for the copy.
Remove	Click to delete the template.

4. Click **Close** to exit Correspondence Templates.

E-Signature templates are available from the Send for E-Signature dialog when sending documents for signature.

Related Topics

Correspondence Setup Overview
E-Signature Overview
Using DocuSign or RightSignature
Using HawkSoft E-Signature (Powered by Formstack Sign)

Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)

HawkSoft CMS enables you to make formatting changes and insert merge fields, signatures, and other elements into your letter, memo, proposal, and the Policy Overview templates.

See Communications Overview and Correspondence Setup Overview for more information about the different types of correspondence in CMS, and how to create and use templates.

Email – To modify email templates, see Modifying Email Templates.

Text Messaging – To format a text message template, see Text Message Templates.

This article describes the various formatting options available when modifying correspondence templates within CMS.

HawkSoft includes the ability to import Email, Text Messaging, Proposal, and Form Letter templates from your local files, enabling you to quickly use templates from other HawkSoft agencies or other sources. See Importing and Exporting Correspondence Templates for more information.

In this topic:

Adding Merge Fields	Adding Objects to Correspondence
Adding Images/Logos/Pictures to Correspondence	Adding Page Breaks and Lines

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Correspondence Templates

See Setting User Permissions for more information.

How do I get here?

The CMS Letter Editor opens when creating correspondence templates in CMS. The following steps assume you are creating or modifying a template and have the Letter Editor window open.

Adding merge fields

Merge fields are used to insert information from client or policy files into correspondence at the time it is generated.

For example: You can insert a Policy Number merge field into a template, and then when you create a letter, the Policy Number from the selected policy will prefill where you inserted the merge field in the template.

> Some field selections activate the **Merge Field Properties** dialog. Follow on-screen prompts to insert the field.

1. With the CMS Letter Editor open, position your cursor where the merge field information should appear, and then click **Insert** > **Field** from the editing menu bar.

   The **Select Merge Field to Insert** dialog opens.

2. Select a field from the list.

   > Use the **Filter Fields** and **Filter Category** to quickly find a field name.

3. Optional: If available, select a capitalization format for the field from the **Formatting** drop-down list.

   - **Proper Case** – The first letter of each word is capitalized.
   - **Upper Case** – All letters are capitalized.
   - **Lower Case** – All letters are lower case.

4. Click **Insert**.

   The merge field is inserted in your template and the dialog stays open to add more fields as needed.

5. Reposition your cursor to insert another merge field, as needed.

6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all fields have been inserted.

Adding a signature

CMS enables you to insert a signature into form letter, proposal, and memo templates.

See User Signature Setup to scan and set up your signature in CMS. Once your signature is set up, use the steps to Add a merge field.

Insert > **Field** > **Agent Signature**

The following fields are available for the signature:

Agent Signature (Agent 1)

Agent2 Signature

Agent3 Signature

- The user creating the correspondence must be authorized to use the signature intended for this item in order for the signature to display.
- When inserting the signature of another user on a letter or proposal, the agent's initials must appear on the GPI screen in the Agent 1, Agent 2, or Agent 3 field.

Adding User Input fields

A User Input field provides a "placeholder" for the user to enter information that cannot be automatically merged from a CMS client or policy. These fields are typically added to form letter templates. When a user selects a form letter that contains a User Input field, they are prompted to insert specific information before printing the letter.

> User Input fields should not be placed in form letters intended for mass mailings.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Field**

   The **Select Merge Field to Insert** dialog box opens.

2. Select **User Input** from the Field list.
3. Enter the expected user input in the **Description** field at the bottom of the dialog.

   Example: If you enter "**Need By**" in the Description field, this description appears as a prompt to the user.

4. Click **Insert**.

   The merge field is inserted and the dialog stays open to add more fields if necessary.

5. Optional: Reposition your cursor to insert another Input field, as needed.

   With the User Input field selected, you can change the Description, and then click **Insert**.

6. Click **Close** to exit the **Select Merge Field to Insert** dialog when all input fields have been inserted.

Formatting merge fields

Edit the font, font size, or color

1. Highlight the entire field, including chevrons: <<text>>.
2. Modify the field, as needed.

Use the Format menu or toolbar icons to apply formatting and edit the font, font size, or color.

3. Click **Save & Close** when all changes are made.

Delete a merge field

1. Highlight the entire field, including chevrons: <<text>>.
2. Press **Delete** on your keyboard.
3. Click **Save & Close** when all changes are made.

Adding objects to correspondence

Objects are files such as graphs or tables that can be added to CMS correspondence. Objects can be added to correspondence templates as well as correspondence created from a client/policy.

Creating a new object

You can insert a new object, for example a blank Excel spreadsheet, and then insert your data directly into the object.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Object**.

   The **Insert Object** dialog box opens.

2. Select the appropriate **Object Type** (file), and then click **OK**.

   The CMS Letter Editor refreshes to display the selected object, with available editing tools from the corresponding program.

3. Modify the object as needed.

Adding an object from an existing file

You can insert a previously saved document, for example an Excel spreadsheet that contains data.

1. With the Letter Editor open, position your cursor, and then click **Insert** > **Object**.

   The **Insert Object** dialog box opens.

2. Select **Create from File**.
3. Click **Browse**.

   The **Browse** dialog opens.

4. Select the file, and then click **Open**.

   The path to the object is displayed in the **Insert Object** dialog.

5. Select **Link** or **Display As Icon**:

   Link – Inserts a picture of the file contents into your document. The picture will be linked to the file so that changes to the file will be reflected in your document.

   Display As Icon – Inserts a picture of the file contents.

6. Click **OK** to insert the object into the template.

Adding images/logos/pictures to correspondence

Images saved on your computer or network as JPG, BMP, TIF, or GIF can be added to letters, memos, and proposals.

1. With the **CMS Letter Editor** open, position your cursor, and then click **Insert** > **Picture**.

   The Windows ®**Open** dialog opens.

2. Browse to locate the image, and then click **Open**.

Adding page breaks and lines

Page breaks and lines can be added to correspondence templates as well as correspondence created from a client/policy.

- **Page Break** – Provides a way to manually insert a page break at any point so you can determine the flow of the document.
- **Line** – Can be used to visually separate one section of text, objects, or pictures from another section to make the document more readable.

Adding a page break

Position your cursor, and then click **Insert** > **Page Break**.

The break will be visible in the Print Preview.

Adding a line

1. Position your cursor, and then click **Insert** > **Horizontal Line**.

   The **Horizontal Line** dialog appears.

2. Select line height and color.

   The preview changes as you modify the line.

3. Click **OK**.

Related Topics

Correspondence Setup Overview
Importing and Exporting Correspondence Templates
Modifying Correspondence (Letters, Memos, Proposals, and Policy Overview)
Modifying Email
Text Messaging with Email-to-SMS Services
Text Message Templates

Importing and Exporting Correspondence Templates

HawkSoft CMS enables you to share Correspondence Templates with HawkSoft users outside of your agency, as well as third-party sources, such as a drip marketing vendor. This topic provides instructions for exporting templates out of your database *to* your local computer, and importing templates *from* your local computer.

For more information on setting up Correspondence Templates, see the Correspondence Setup Overview. For using and creating correspondence in HawkSoft, see Communications Overview.

This task is typically performed by an Owner/Administrator, Manager, or Bookkeeper.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> **Setup** > **Correspondence Templates**
>
> See Setting User Permissions for more information.

In this topic:

To import a Correspondence Template

You can import HawkSoft correspondence templates created and sent by HawkSoft users outside of your agency into your HawkSoft database. For a list of what types of files can be imported, see the Importing and Exporting Correspondence Templates section below.

> Imported Correspondence Templates might not be formatted to your agency's standards and should be reviewed before use.

1. Click the Settings icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **Form Letters**, **Email**, **Proposals**, or **Text Messaging** side-tab, depending on which kind of template(s) you will be importing.

3. Click **Import**on the Correspondence Templates window.

   File explorer opens so you can select the template file(s).

   > Hold the **Ctrl** key and select multiple templates to import multiple templates at once.

4. Browse to the location of the template(s) in your files.

5. Select the desired template(s), and then click **Open** to import the template(s).

   If the file already exists, you are prompted to overwrite the existing file.

To export a correspondence Template

You can export your existing HawkSoft correspondence templates to share with HawkSoft users outside of your agency. For more information about HawkSoft template file types, see Importing and Exporting Correspondence Templates.

Correspondence templates that were not created inside of HawkSoft might not export successfully.

> Correspondence Templates might contain proprietary data – they should be reviewed before exporting.

1. Click the Settings icon, and then select **Correspondence Templates**.

   The **Correspondence Templates** dialog opens.

2. Select the **Form Letters**, **Email**, **Proposals**, or **Text Messaging** side-tab.

3. Select the template(s) you wish to export.

   > Hold the **Ctrl** key and select multiple templates from the list to export multiple templates at once. When exporting multiple

templates, all templates are saved together in a single 'CMS Template Package' file.

4. Click **Export**.

   File Explorer opens.

5. Browse to the location where you want to save this template.

   You can re-name this template in the Name field as needed.

6. Click **Save**.

   A confirmation message appears, and your template package is saved in your local files, ready to be shared with other agencies.

File Types

HawkSoft uses custom file types to make sharing correspondence templates as easy as possible. These file types are readable by any current HawkSoft CMS application. All files are exported using these file types. HawkSoft can also import additional file types, depending on the type of correspondence template.

Exported file types

- Form Letter templates are exported as **.CMSLetterTemplate** files.
- Email templates are exported as **.CMSEmailTemplate** files.
- Text Message templates are exported as **.CMSSMSTemplate** files.
- Proposals are exported as **.CMSProposalTemplate** files.

Importable file types

In addition to the file types above, you might need to import a template with a different file type from a third-party. The following file types can be imported into correspondence templates:

- Form Letter templates can be imported from **.rtf** files.
- Email templates can be imported from **.html** files.
- Proposal templates can be imported from **.zip** and **.rtfpc** files.
- Text Message templates can be imported from **.txt** files.

HUG Template Repository

You can source correspondence templates from the HawkSoft User Group (HUG). You will need to create a HUG account, at no charge, to view this page.

https://hawksoftusergroup.org/resources/template-library/

Related Topics

Communications Overview
Correspondence Setup Overview
Email Templates
Form Letter Templates
Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview)
Proposal Templates
Text Message Templates

HawkSoft Integrations and Product Add-Ons

HawkSoft CMS offers additional features and integrations with a variety of third-party software applications.

This article includes a variety of features and integrations for your agency.

In this topic:

Communications

About HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This topic provides links to additional articles to help you set up text messaging as well as everything you need to know to use the text messaging feature.

About HawkSoft Text Messaging

Electronic Signature Providers

HawkSoft enables you to easily send documents directly from CMS to your customers for an electronic signature. You can create templates to send with your client/policy attachments, ACORD forms, Change Request forms, as well as additional documents saved to your computer. Your customers can then "sign" the document(s) electronically and return them via the electronic signature application you have configured in CMS.

Providing your customers with the ability to electronically sign documents can help improve the quality of their service experience and speed up the time necessary to get documents signed.

You can purchase HawkSoft E-Signature (Powered by Formstack Sign) as an add on product, or you can use one of the e-Signature providers that HawkSoft integrates with.

E-Signature Overview

HawkSoft CMS Phone System Integration

HawkSoft enables you to configure your phone system to integrate with CMS. This integration enables you to place outbound calls from within a client file with the click of a mouse, and to open an inbound caller's client file as soon as you receive a call.

Depending on your provider, different configuration options are available. Most providers enable you to configure both outbound dialing and inbound call screen pops with CMS.

If your provider has configured inbound calls, CMS either opens the client file automatically, or displays a dialog with the option to open the client file.

Phone System Integration

Quotes

IVANS Market Appetite

HawkSoft CMS integrates with IVANS Market Appetite to enable you to quickly identify markets for commercial lines risks directly from CMS.

IVANS Market Appetite is easy to use. Simply click the link provided in CMS to view a list of carriers with an appetite for a specific risk in your client/policy.

You can easily access the IVANS Market Appetite website from within the client policy or from the CMS toolbar.

IVANS Market Appetite

Comparative Raters

The HawkSoft Client Management System provides tools for integrating CMS with comparative rating programs. Depending on the vendor your agency works with, the integration may be one-way or two-way.

- **One-way integration** – Enables your agency to seamlessly pass client and policy information to the rater for quoting new business or re-rating current clients. These "one-way" bridges transfer information to or from CMS, but not both directions.
- **Two-way integration** – Enables CMS to send client and policy data to the rater, and from the rater back to CMS. Using these bridges reduces the amount of time spent entering data and can significantly increase productivity.

Comparative Raters Overview

HawkLink

HawkLink is a tool that enables you to launch websites from within HawkSoft CMS, and populate website fields with information from a client file or policy stored in HawkSoft. Using HawkLink makes it quick and easy to request quotes from carriers.

HawkLink Overview

Consumer Applications

Agent Portal

HawkSoft Agent Portal enables you to access client and policy information stored in CMS from your web browser. Because it is optimized for mobile devices, you can use Agent Portal on your phone or tablet to quickly and securely access the information you need on the go.

Agent Portal Setup

Agent Portal

HawkSoft Partner API

HawkSoft enables partnered third-party vendors, such as agency marketing services, to integrate with your HawkSoft database. Using the Partner API, approved vendors can pull client and policy data from HawkSoft into the third-party application, or send log notes and/or attachments directly into a policy in HawkSoft.

Integrations with partnered third-party applications can be enabled through the HawkSoft Marketplace.

To create a toolbar shortcut for 3rd-party programs

HawkSoft enables you to create a shortcut on the CMS Toolbar that allows you to quickly open a 3rd-party program or website, such as the integrations listed below, from within CMS.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Computer Specific Settings
>
> See Setting User Permissions for more information.

1. Open the **Setup** menu.
2. Select **Computer Specific Settings**.
3. Select the **External Tools** tab.
4. Click **New**.

5. Enter a **Tool Name**.
6. Select the **Tool Type** (Program or Website).
7. *Optional:* Enter a **Tooltip** that will appear upon hovering over the shortcut.
8. *Optional:* Enter **Help Text** to describe the Tooltip.
9. Enter the path to the program in the **Command** field.

   If this is a Website tool, enter the web address in this field.

   > Use the ... button to browse to the program through the File Explorer.

10. *Advanced:* Enter launch parameters in the **Arguments** field, if necessary.

    > Most programs do not require Arguments or a separate Initial Directory. If arguments are required to launch the program, or to perform an action such as logging in, contact your vendor's support to see what arguments to enter.

11. *Advanced:* Change the **Initial Directory** of the shortcut, if necessary.
12. Click **Test** to test your shortcut.

    If your program or website launches, the shortcut is set up correctly.

13. Click **OK**.
14. Click **OK** to save your Computer Specific Settings.

    The shortcut should now be visible from your CMS Toolbar.

For more information on External Tools, see Shortcuts to External Tools [+ Video].

Rocket Referrals/ClientCircle

HawkSoft and Rocket Referrals have always shared a unique point of view in the industry as family-owned, private businesses committed to bringing technology solutions to independent insurance agencies without relying on outside investors.

We have made it easier than ever for agencies to pair our complimentary products by offering HawkSoft+ Rocket Referrals, our standard software bundle that includes both systems on a single bill. This all-in-one solution provides the most powerful agency management and client communication combination in the industry, so your agency can get more done with less effort. Your staff can spend their workday in HawkSoft while the communications and follow-up task assignments happen automatically in the background through Rocket Referrals.

In addition, existing HawkSoft agencies can integrate their HawkSoft database with ClientCircle™ by Rocket Referrals. This two-way integration enables you to send client data from HawkSoft to ClientCircle, and enables ClientCircle to send log notes and attachments back to client files in HawkSoft.

Rocket Referrals

Levitate

Levitate is a keep-in-touch marketing platform that enables you to automatically sync client contact information from HawkSoft into the Levitate system, along with key policy information such as renewal dates and line of business. Leverage your HawkSoft data in Levitate and set up unique reminders to reach out, such as on birthdays or renewal dates, and be notified to email contacts you haven't spoken to in a while.

Purchase Levitate via HawkSoft Marketplace.

Learn more about Levitate

AgencyBuzz

AgencyBuzz® is "web-based audience engagement" marketing software created by Insurance Technologies Corporation (ITC). AgencyBuzz integrates with CMS to enable agencies to automate their email and social media marketing programs by accessing client information directly from CMS.

AgencyBuzz

Agency Revolution

Hawksoft CMS supports direct integration with Agency Revolution's automation software, Fuse™. Hawksoft customers that use Fuse™ will be able to micro-segment and automate email, direct mail, and text messages to their clients based on the information stored in Hawksoft CMS. To learn more about this integration, please contact Agency Revolution.

Agency Revolution

NetQuote Integration

Integration with NetQuote® allows users to move insured and policy information from NetQuote leads into HawkSoft CMS.

NetQuote Integration

Insurance Agent Mobile

HawkSoft integrates with Insurance Agent Mobile® to help agencies engage and retain clients on a mobile application platform. Your clients can conveniently view their profile and policy information at any time.

Insurance Agent App

Generic/Website Integration

CMS includes a generic data importer that allows users to import data using ACORD XML, AL3 (ACORD Level 3, and Tagged file formats. This article is intended for IT, software, or website developers that have been tasked with sending data to CMS.

Generic/Website Integration

State Specific Integrations

New York ID Card Generator Integration

HawkSoft CMS integrates with the New York ID Card DMV software (Insurance Information Enforcement Systems IIES) to enable you to print ID cards from within CMS. Policy information is sent from CMS directly to the New York ID Card DMV software, and then the software creates the ID card for CMS to print, email, and/or attach to a policy.

New York ID Card Generator Integration

Related Topics

HawkSoft Marketplace

About HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This topic provides links to additional articles to help you set up text messaging as well as everything you need to know to use the text messaging feature.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to a third-party *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.
>
> See Text Messaging Overview for more information.

Notes about HawkSoft Text Messaging

- **Opt in required**
  Federal law requires your customers to opt in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act. HawkSoft automates this opt in process with the click of a button. Learn more.
- **Texting is not for marketing purposes**
  HawkSoft Text Messaging is only for informational texts. You may be in violation of federal and/or state regulations if you use texting for marketing purposes. You can read more about best practices for text messaging and maintaining TCPA compliance on our blog.
- **Your agency receives one text messaging phone number**
  Your agency is assigned one central text message phone number. Even if multiple staff members are texting a client, that client will see text messages arriving from a single phone number.

Purchasing HawkSoft Text Messaging

To take advantage of this feature, your agency must first enable . Once Data Sync has been enabled, a billing contact for your agency can purchase Text Messaging through the Marketplace.

See Purchasing HawkSoft Text Messaging for detailed steps on how to purchase the text messaging feature.

Text Messaging Opt in Workflow & Compliance

FCC requires all clients opt in to receive text messages from your agency. HawkSoft simplifies this requirement with an automated opt-in workflow.

Text Messaging Opt-In Compliance

Viewing & Sending Text Messages

HawkSoft makes it easy to view client text messages and send replies from a variety of locations within CMS. Available views and options depend on your texting permissions.

Viewing & Sending Text Messages

Processing Text Messages

Once you have taken action as a result of the text conversation, you can copy the relevant texts into a log note to document history and mark the texts as "processed." This guide details our recommended workflow for processing text messages.

Processing Text Messages

Unmatched Texts

When a text message is received from a number that does not match a client file, those texts are collected in the "Unmatched Texts" view. Learn how to match text messages with a client file in this guide.

Unmatched Texts

Text Message Notification Settings

HawkSoft CMS keeps your team updated on incoming text messages through real-time notifications and text counts.

You can receive text notifications and number of incoming texts for:

- Clients for which you are listed as a policy CSR or producer.
- Clients you choose to follow.
- Any unmatched text messages.

Text Message Notifications

Cancelling HawkSoft Text Messaging

If your agency no longer wishes to use HawkSoft Text Messaging, agency administrators can download your agency's texting history and attachments and cancel your subscription through the HawkSoft Marketplace.

Cancelling HawkSoft Text Messaging

Purchasing HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This guide walks you through the steps to purchase and set up Text Messaging for your agency. Since HawkSoft Text Messaging is a Data Sync feature, you must first enable HawkSoft Data Sync from the Marketplace.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file.
>
> See Text Messaging Overview for more information.

In this topic:

Notes on HawkSoft Text Messaging

- **Opt in required**
  Federal law requires your customers to opt-in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act. HawkSoft automates this opt-in process with the click of a button. Learn more.
- **Texting is not for marketing purposes**
  HawkSoft Text Messaging is only for informational texts. You may be in violation of federal and/or state regulations if you use texting for marketing purposes.
- **Your agency receives one text messaging phone number**
  Your agency is assigned one central text message phone number. Even if multiple staff members are texting a client, that client will see text messages arriving from a single phone number.

Before you begin

Before purchasing HawkSoft Text Messaging, you must first register for the HawkSoft Marketplace and enable HawkSoft Data Sync so the application can access your HawkSoft data.

Your email address must be listed on the HawkSoft License Agreement as a main contact.

Register for the HawkSoft Marketplace

The HawkSoft Marketplace offers agency managers the option to enable HawkSoft Data Syncing, purchase and configure HawkSoft products, and integrate with third-party applications.

1. Click the **Settings** icon on the the HawkSoft CMS toolbar, and then select **Marketplace**.
2. Click **Register Now**.
3. Enter your **Email Address**, and then click **Submit**.

   Your email address must be listed on the HawkSoft License Agreement as a main contact. If you receive an error indicating your email address is not listed as a main contact, or your current email address is different than the one used for the HawkSoft License Agreement, please have your agency owner contact billing@hawksoft.com to update your information, and then try again.

An **Authentication Code** is sent to your email address.

4. Copy the code from the email and paste it into the corresponding field on the Marketplace registration window.

5. Check the box below the Authentication Code field stating you agree to the **Terms and Conditions for HawkSoft Marketplace**.

6. Click **Submit**.

   A confirmation message appears.

7. Close the HawkSoft Marketplace Registration screen.

   You are ready to enable additional HawkSoft products and third-party applications.

Enable HawkSoft Data Sync

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > General Configuration Settings
>
> See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Marketplace**.

   If you haven't registered for the Marketplace, see HawkSoft Marketplace for detailed instructions.

2. Click and read the **HawkSoft Terms and Conditions** in the *HawkSoft Data Sync* section, and then check the box to accept the Terms and Conditions.

3. Click **Activate**.

   The **HawkSoft Cloud Confirmation** window opens.

4. Click **Confirm**.

   A confirmation message appears.

5. Click the **Return to Marketplace** button.

Purchase HawkSoft Text Messaging

Once Data Sync is enabled, you can register for Text Messaging through the Marketplace.

1. Click the **Settings** icon, and then select **Marketplace**.
2. Under HawkSoft Text-Messaging, click **Activate**.

   Important HawkSoft Text Messaging Information displays.
3. Review the opt-in requirements, rules regarding use for marketing purposes, information about your phone number, read the terms and conditions, and then click **Next**.
4. Determine if your agency will require users to opt-in before sending messages, allow users to skip the opt-in process, or if HawkSoft's opt-in process will be disabled for your agency.

   > Federal regulations require that agencies receive opt-ins from clients before sending text messages. If you choose to disable opt-ins, or allow agents to skip opt-ins, you agree to receive opt-ins from clients through other means. HawkSoft is not responsible for any fines or penalties imposed by telecom carriers for non-compliance.

   See Text Messaging Opt-In Compliance to learn more.
5. Enter a phone number for clients with questions to call in the **"Help" Response** section.

   When a client sends the phrase 'HELP' to your texting number, an automated message will direct the customer to call this number.
6. Enter an **Area Code** *or* **Zip Code** to generate a localized phone number to be used by your agency for text messaging, and then click **Finish**.

   > In some metropolitan areas, your desired area code may be unavailable. If you receive this error message, use a zip code to generate your phone number.
7. Check "**I understand my agency will be charged $20.00 per month starting on my next HawkSoft invoice.**"
8. Read the **Additional Required Information**.

This section explains that additional information will be required on the next page in order to register your agency with The Campaign Registry (TCR). Telecom carriers require that all businesses sending text messages register their business with TCR.

9. Click **Finish** to complete your order.

   A **Congratulations** page appears, which shows the status of your HawkSoft texting number and lists the next steps towards enabling HawkSoft Text Messaging.

Complete required information to start registration process

Additional information is required to register your agency with The Campaign Registry (TCR) before HawkSoft Text Messaging can be enabled. Telecom carriers require that all businesses sending text messages register their business, or "brand", with TCR.

If this information is not filled out by the agency, a HawkSoft representative will contact your agency to gather this information.

> If you are interested in using your agency's main phone number as your HawkSoft Texting number, you can request to enroll in Main Number Texting through the Required Information Form. See Purchasing HawkSoft Text Messaging for more information.

1. Open The Campaign Registry Required Information Form in your web browser.
2. Fill out the information requested in the form.
3. Click **Submit Information** to send this information to HawkSoft.

   HawkSoft will use this information to register the agency in The Campaign Registry.
4. Close the Marketplace window and return to HawkSoft CMS.

HawkSoft submits this information to The Campaign Registry. After registration is complete within TCR, HawkSoft will activate Text Messaging for your agency.

HawkSoft will send an email to your agency's main contacts once Text Messaging is activated.

If your agency previously used a different text messaging integration (such as Bulk SMS or Message Media), HawkSoft Text Messaging will be automatically set as the default texting tool within all User Settings after activation. If the additional text messaging service is no longer needed, you may cancel the service.

Once your agency receives notification that HawkSoft Text Messaging is activated, all users must restart CMS in order to begin using HawkSoft text messaging.

Your texting number

Once you complete your HawkSoft Text Messaging order, HawkSoft begins creating and registering a new texting number from your agency, using the area code provided on the previous page.

It can take up to five minutes for HawkSoft to register your new phone number. You can click the refresh button after waiting, or view your number at a later time by re-opening the Marketplace and clicking **Manage** under HawkSoft Text Messaging.

Main Number Texting

Upon request, HawkSoft can set up your agency's main phone number as your HawkSoft Text Messaging number. There is a $99 one-time fee for enabling Main Number Texting.

Not all phone numbers are able to be used for Main Number Texting. Your agency will not be charged the one time fee until your requested phone number has been successfully enrolled in Main Number Texting.

HawkSoft Text Messaging setup must be completed before the process for enrolling in Main Number Texting can begin. Your agency will use the separate texting number ordered through the Marketplace until the enrollment is complete.

1. Complete and submit The Campaign Registry Required Information Form in your web browser.

   If your agency already submitted the form but selected not to enroll in Main Number Texting, and you would now like to switch to your agency's main number, contact Product Support for assistance.

   a. Within the Required Information Form, select **Yes** next to **"Do you wish to enroll in Main Number Texting?"**

b. Complete the additional fields that appear with your main number, your phone service provider, the business name you use with your phone service provider, and the service address you use with your phone service provider.

Once HawkSoft is notified of intent to enroll, the agency principal will receive an email from HawkSoft staff containing a Letter of Authorization and signing instructions. If your agency did not complete the additional Main Number Texting fields within the TCR Required Information Form, you will be asked to provide additional information.

2. Complete the **Letter of Authorization**.
3. Reply to the email from HawkSoft with the completed Letter of Authorization attached. Provide any additional information needed within your reply, if requested to do so by HawkSoft.

Upon receipt, HawkSoft informs all agency main contacts that HawkSoft will now attempt to get the requested phone number for Main Number Texting, and will notify the agency when the process is complete.

You will receive an email from HawkSoft confirming that your agency is now signed up for Main Number Texting, using the number you requested.

> Once Main Number Texting is enabled, all old messages and opt-ins will remain, however your previous HawkSoft Text Messaging number will no longer be active, and any texts sent to the old texting number will not be received going forward. Make sure to inform your clients of the changed texting number.

If HawkSoft is unable to get the requested number, HawkSoft will inform the agency's main contacts, and you may request to try a different number.

Text messaging administration

Once HawkSoft Text Messaging is enabled, all users can begin sending outgoing text messages to client files they have access to. Administrators can disable text messaging for certain users within User Permissions.

Available Texting Permissions:

- **Client File > Allow Sending Text Messages**: Grants permission for CMS users to send outgoing texts to clients.
- **Setup > Texting Administration**: Allows users to view all text messages, regardless of client file permissions, via the All Unprocessed Text Menu.

Permissions are not required to *view*text messages, so long as the user has permissions to access the client's file.

See About HawkSoft Text Messaging for more information on HawkSoft Text Messaging workflows.

Related Topics

Processing Text Messages
Text Message Notifications
Text Messaging Opt-In Compliance
Viewing & Sending Text Messages

Text Messaging Opt-In Compliance

Federal law requires your clients to opt in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act.

As part of setting up HawkSoft Text Messaging for your agency, you are given the option to automatically require clients to opt in before receiving text messages from your agency.

In this topic:

	Configuring Opt-In Settings	Sending an Opt-In Request
Verify Client Opt-In Status	Manually Opt-Out a Phone Number	Resend Opt-In Texts

This guide walks you through the steps to change the opt-in requirement setting after setup is complete.

As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file. This feature enables you to use your existing mobile number.

See Text Messaging Overview for more information.

Configuring opt-in settings

During setup, HawkSoft provides three options to address opt-in requirements:

Use HawkSoft's automated opt-in process – This option requires that all users send an automated opt-in message to clients. Clients must reply "yes" to this message before outgoing texts can be sent. This is the recommended option as it helps your agency maintain compliance with federal regulations.

Allow users to accept legal liability for my agency and skip the opt-in process – This option allows HawkSoft users to skip the opt-in process for individual phone numbers. This is helpful if your agency collects opt-ins through another method and certain clients have already given their permission to receive text messages.

Accept legal liability on behalf of my agency and disable the automatic opt-in process - This option removes the opt-in process for all client files.

You can change your selection at any time by returning to **Marketplace**.

1. Click the **Settings** icon, and then select **Marketplace**.
2. Scroll down to the Text Messaging section.
3. Click **Manage**, and then click **Next** to change your Opt-in selection.
4. Click **Save**.

Each user must restart CMS for the new opt-in workflow to take effect.

Regardless of which method you select, if a client opts out of text messages by sending "Stop," you are required to complete the HawkSoft opt-in process and receive a "yes" in reply to resume text communication.

To send an opt-in request

If Automatic Opt-In is enabled, HawkSoft CMS will not allow you to send an outgoing text message until the client has opted in for text messages.

The opt-in request is sent as a text message. Once a client replies with "Yes," they will be opted in and ready to receive future texts.

Send an opt-in request from the Action menu

HawkSoft recommends using the Action menu to send the initial opt-in request, to create a log note.

1. Retrieve the client file, and then select the Client tab.
2. Click Action, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Send Text Message**.
   The **Text Message Recipients** dialog opens to display all cell phone numbers associated with the client file, as well as their opt-in status.
4. Select one or more phone numbers by checking the box next to the number, and then click **Send Opt In**. The opt-in status for each phone number will change to Pending.

   > If your agency does not require automatic opt-in, you will see the option to skip sending this message.

5. Click **Finish** on the Text Message Recipients dialog.
6. Click **Finish** on the Action menu.

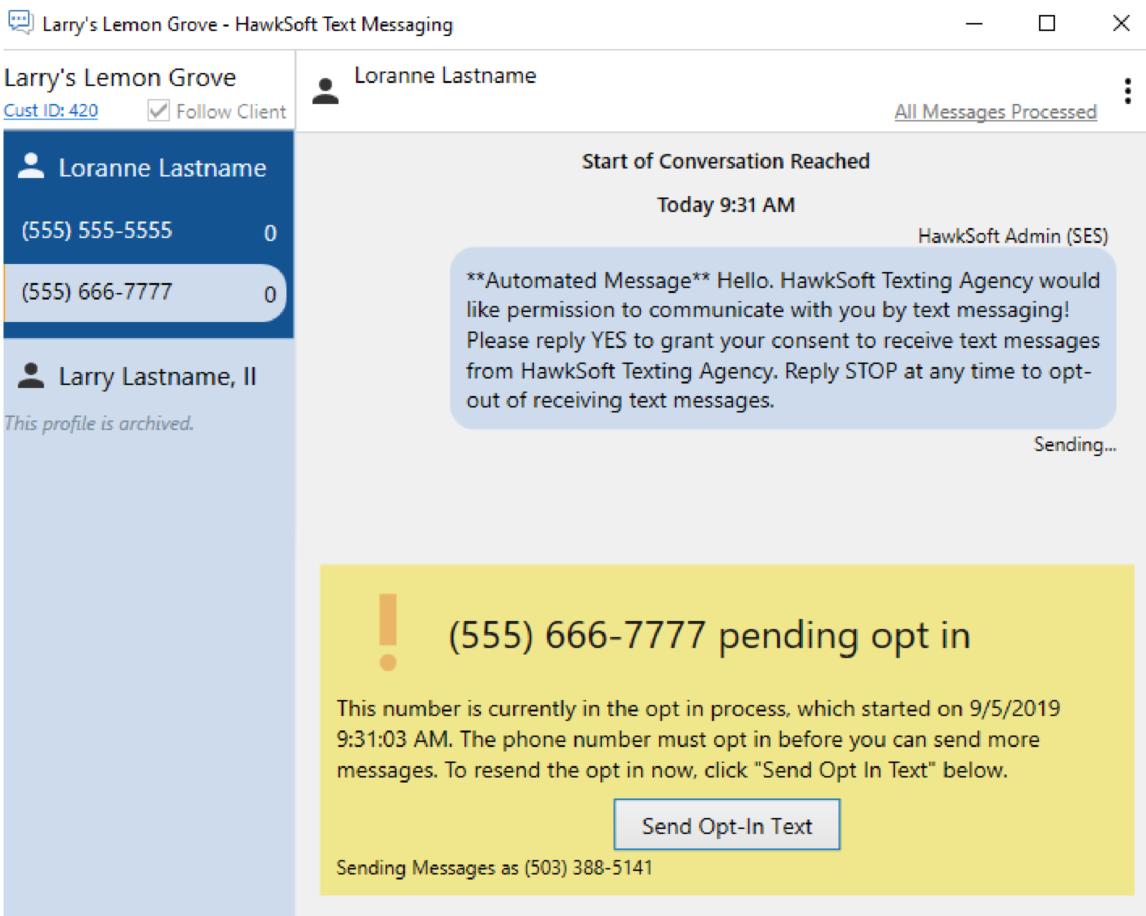
HawkSoft creates a log note to document the opt-in request.

Send an opt-in request from a texting view

1. Select a phone number from the side-bar of the Client Texts, My Texts, or Unmatched Texts view.
2. Click **Send Opt-In Text**.

If your agency does not require automatic opt in, you will see the option to skip sending this message.

Once the opt-in request is sent, it remains Pending until the client accepts.



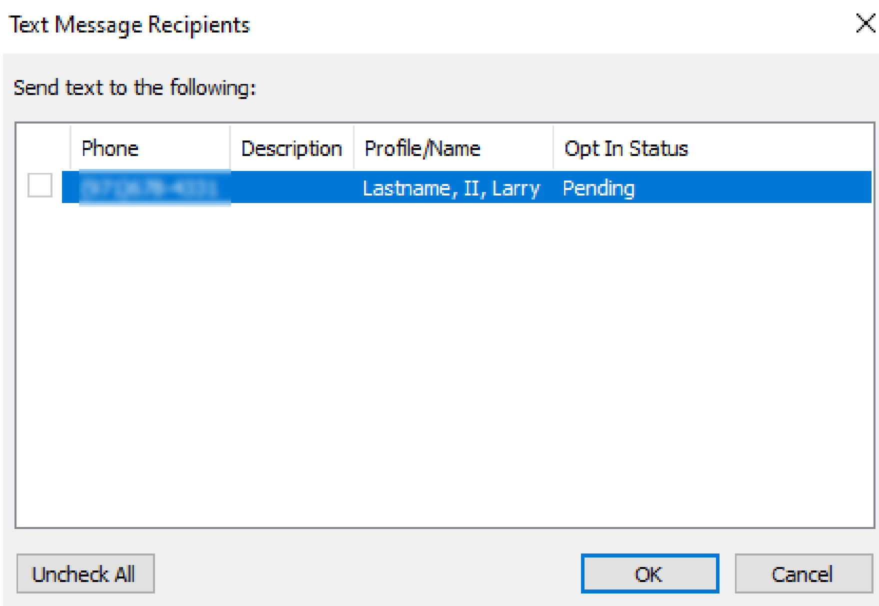
Once the client replies "Yes" to the automatic opt in message, you can begin sending text messages.

Clients can opt out of text messaging anytime by texting "Stop."

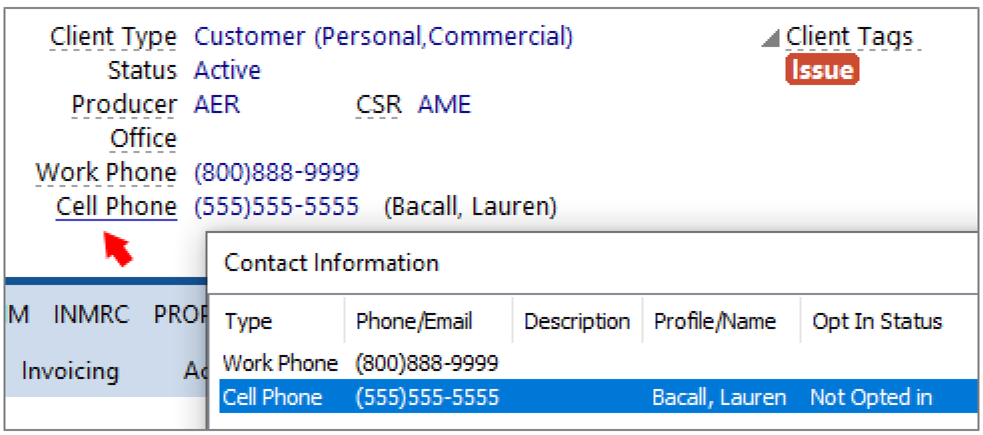
To verify client Opt-In Status

You can verify the client's opt-in status from a few places in CMS:

- Click the ⋮ icon on the **Text Messaging** dialog, to view the client's **Opt-In Status** at any time.
- View the status from the **Text Message Recipients** dialog when using the **Action** menu to initiate a text.



- Click on the Cell Phone link on the client file to open the Contact Information dialog.



To manually Opt Out a phone number

Clients can automatically opt out of text messaging anytime by texting "Stop." In addition, if a client expresses verbally or otherwise that they do not wish to receive text messages from your agency, you can manually opt out their phone number.

1. Retrieve the client file, and then select the Client tab.
2. Click **Action**, and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Change Client**.

4. Select a phone number within the Contact Info box, and then click **Edit**.
5. Click **Opt Out Phone Number**.

   A confirmation message appears.

If you wish to send a text message to the client in the future, you will have to initiate the opt in process.

To resend Opt-In Texts

Occasionally you might need to resend the opt-in message to a client. Some agencies might want to renew opt-in statuses yearly, or a client might acquire a different phone number.

1. Retrieve the client file, and then select the Client tab.
2. Click on **Client Texts**.
3. Click on the ⋮ icon in the right-hand corner of the Texting window, then select **Opt-In Status**.

   A message appears confirming the number has already been opted in.
4. Click **Send Opt-In Text**.

   HawkSoft will not allow any outgoing text messages to the client's number until they have replied "Yes" to the opt in text message.

Related Topics

About HawkSoft Text Messaging
Text Message Notifications
Purchasing HawkSoft Text Messaging
Viewing & Sending Text Messages

E-Signature Overview

HawkSoft enables you to easily send documents directly from CMS to your customers for an electronic signature. You can create templates to send with your client/policy attachments, ACORD forms, Change Request forms, as well as additional documents saved to your computer. Your customers can then "sign" the document(s) electronically and return them via the electronic signature application you have configured in CMS.

Providing your customers with the ability to electronically sign documents can help improve the quality of their service experience and speed up the time necessary to get documents signed.

You can purchase HawkSoft E-Signature (Powered by Formstack Sign) as an add on product, or you can use one of the e-Signature providers that HawkSoft integrates with.

HawkSoft E-Signature (Powered by Formstack Sign)

> Formstack Status: PSRs can check for issues/outages with Formstack Sign at https://formstacksign.statuspage.io/

To purchase HawkSoft E-Signature (Powered by Formstack Sign)

HawkSoft E-Signature (Powered by Formstack Sign) is available to your agency as an add on service through Marketplace. Once purchased, you can begin sending documents for an electronic signature without any setup.

To purchase HawkSoft E-Signature and assign licensing to specific users, your email address must be listed on the HawkSoft License Agreement as a main contact. If your agency contact information needs to be updated, please have your agency owner contact billing@hawksoft.com to request a change.

No additional configuration is needed with HawkSoft E-Signature.

See Purchasing HawkSoft E-Signature (Powered by Formstack Sign) for instructions.

HawkSoft E-Signature (Powered by Formstack Sign) Account Settings

Once you have purchased HawkSoft E-Signature (powered by Formstack Sign), you can configure Account settings for yourself and for your agency.

HawkSoft E-Signature Account Settings

Using HawkSoft E-Signature (Powered by Formstack Sign)

HawkSoft E-Signature enables you to quickly prepare and send documents for signature directly from a client's file in HawkSoft CMS. This topic describes many of the E-Signature options and features available.

Using HawkSoft E-Signature (Powered by Formstack Sign)

Additional HawkSoft E-Signature providers

In addition to HawkSoft E-Signature (Powered by Formstack Sign), HawkSoft has direct integration available with the following e-Signature providers:

DocuSign™

Contact: 800-379-9973

Original RightSignature® v3

RightSignature enables integration only with Original RightSignature v3. If you have New RightSignature v4, you can contact your RightSignature representative and request to roll back to v3.

Contact: 855-884-2257

> If HawkSoft doesn't have direct integration with your e-Signature provider, you can easily drag and drop documents from a client/policy into your e-Signature program.

Configuring Docusign or RightSignature

Before the e-Signature feature can be used with another provider, integration must be configured in your User profile.

E-Signature Configuration: DocuSign or RightSignature

Using Docusign or RightSignature

HawkSoft enables you to easily send documents directly from CMS to your customers for an electronic signature. You can create templates to send with your client/policy attachments, ACORD forms, and Change Request forms, as well as additional documents saved to your computer.

Using DocuSign or RightSignature

HawkSoft E-Signature Templates

HawkSoft CMS enables you to create templates for composing standardized e-Signature messages to send to clients with documents to be signed. These templates can be used with any e-Signature provider. You can also attach documents to templates, such as agency, company, or state disclosures or acknowledgments. These documents will be included in your e-Signature package when the template is selected. Templates can be selected, and modified, if needed, when sending documents for electronic signature.

E-Signature Templates

Phone System Integration

HawkSoft enables you to configure your phone system to integrate with CMS. This integration enables you to place outbound calls from within a client file with the click of a mouse, and to open an inbound caller's client file as soon as you receive a call.

Depending on your provider, different configuration options are available. Most providers enable you to configure both outbound dialing and inbound call screen pops with CMS.

If your provider has configured inbound calls, CMS either opens the client file automatically, or displays a dialog with the option to open the client file.

This article explains how to configure CMS to integrate with your phone system.

In this topic:

Before you begin	Incoming Call Integration (ScreenPops)	Outbound Call Integration

Phone integration is only supported on Windows workstations and cannot be configured on Mac devices. Inbound call integration is ***not*** supported on Windows 7.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

Before you begin

Before integrating the agency's phone system with HawkSoft, verify that the phone system supports integration.

- For inbound call integration, the phone software must include the ability to launch third-party applications upon receiving a call.
- For outbound call integration, the phone software must support placing calls using the **CallTo** and/or **Tel** protocols within Windows.

Phone Integration Glossary

VoIP

Voice Over Internet Protocol - This term describes any voice or phone service that operates through the Internet instead of through telephone lines. Most VoIP services run through a computer.

Protocol

A language that computers use to communicate with each other. On workstations running Windows, the main protocols for communicating with VoIP software are **CallTo** and **Tel**.

Argument

Information that one program shares with another. For the purposes of this article, arguments include the CMS Username, CMS Password, and caller's phone number.

Program Call

An action one program takes to launch a separate program. For outbound phone calls, CMS makes a program call to the phone system, and for inbound calls the phone system makes a call to CMS.

Path

Also known as 'file path' or 'program path'. This is the location of a program, file, or folder on a computer.

%LocalAppData%

This is a variable pre-built into Windows that points to the user's local appdata folder. (C:\Users\ *[User Name]*\AppData\Local).

Incoming Call Integration (ScreenPops)

> Incoming call integration is not supported on Windows 7.

Incoming call integration uses a feature called "ScreenPops" to match client files to a caller's phone number. Upon receiving a call, CMS searches all client files for the caller's number. If at least one client contains the caller's number, a ScreenPop opens showing all client files containing that number.

To configure incoming calls, your agency's VoIP software must be configured to launch the ScreenPop application, with arguments for the CMS user's initials, password, and the caller's phone number. The steps to do so vary between VoIP providers, and as such it is recommended to have an agency technician assist with incoming call integration setup.

Local agencies

For locally hosted agencies, the VoIP software should be configured to launch **%localappdata%\hawksoft\cms\program\CmsScreenPop.exe**.

If you have a non-standard HawkSoft installation, such as a terminal server, this path may differ for you. If the above path does not work, have your agency technician point the VoIP software to the **CMSScreenPop.exe** application within the HawkSoft folder in your local AppData or the agency's HawkSoft database.

Incoming Call Arguments

Arguments highlighted in bold are required for ScreenPops to function.

/PHONE:"%P"	Passes the phone number to CMS. **%P** stands for the variable used by the phone system for the caller's phone number. This variable may vary between phone vendors; for example, %P should be replaced with **%E** on RingCentral phones.

/LOGIN:[user initials]	Passes the user's CMS initials to the ScreenPop application. For example, **/LOGIN:CMS**
/PASSWORD:[password]	Passes the user's CMS password to the ScreenPop application. For example, **/PASSWORD:Secret123!**
/LAUNCH (Optional)	If this argument is included, HawkSoft will automatically launch the matching client file. If this argument is *not* included, or if there is more than one matching client file, a ScreenPop appears showing which client files match the caller's number, and gives an option to launch the selected client.
/CFG:[config file path] *(Optional)*	For local agencies in multiple database environments, use this argument to point to the correct configuration path.
/DURATION:[seconds] *(Optional)*	If this argument is included, ScreenPops will only appear for the amount of time set once launched.

List of common phone providers and parameters required

HawkSoft does not maintain documentation for any of the following phone systems. Please direct phone system questions to the agency technician or phone provider.

Toshiba Call Manager

/PHONE:"%P" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

Xarios Phone Manager

Set objShell = CreateObject ("Wscript.Shell")

ObjShell.Run ("C:\HAW\HawkSoft.Connect.exe" /cfg:C:\haw\hawk.ini /PHONE: " + PhoneControl.CLI + " /LOGIN:"*[initials]*" /PASSWORD:"*[password]*")

ISymphony

/PHONE:"%CID NUMBER%" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

SAMSUNG XCHANGE

/PHONE:"%CALL" \CONTACT\TEL% /LOGIN:*[initials]* PASSWORD:*[password]* /LAUNCH

> XChange Integration needs to be set up as a Custom Button.

RINGCENTRAL

/PHONE:"%E" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

AllWorx

/PHONE:"%CALLNUM%" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

IdentaPop Pro

Supports many Tel Protocol compliant business telephone systems including 3CX, Alcatel, Allworx, Asterisk, Avaya, Cisco, Ericsson, ESI, Freeswitch, NEC, Nitsuko, NBX, Nortel, Panasonic, Phillips, Siemens, Splicecom and Zultys.

This software can pass Caller ID information from these phone systems to an external program such as HawkSoftConnect.exe.

/PHONE:[CID] /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

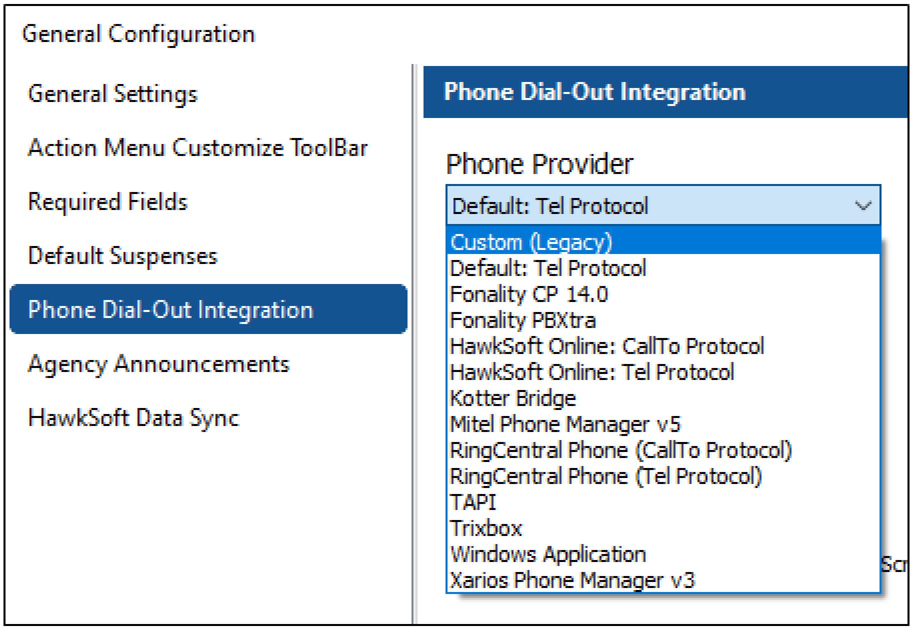
Outbound call integration

HawkSoft enables users to call clients' phone numbers directly from CMS by placing a program call containing the number to call to the user's phone system.

To enable outbound integration within CMS, a default phone provider or protocol needs to be set inside of General Configuration. However, individual users can override the default setting from the User List.

To set the default phone provider or protocol in CMS

1. Open the **Setup** menu.
2. Open **General Configuration**, and then select **Phone Dial-Out Integration**.
3. Select the agency's phone provider or protocol from the **Phone Provider** drop-down.



4. *Optional:* Enter a phone number and click **Call Now** to test the integration.
5. Click **OK** to save changes.

To override a user's phone provider or protocol in CMS

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > User List *(Required to edit a user profile other than your own)*

See Setting User Permissions for more information.

1. Open the **Setup** menu.
2. Open the **User List**.
3. Select the user to edit, and then click **Edit**.
4. Select the **Phone Dial-out Integration** tab.
5. Check **Override Setup > General Configuration Setting**.
6. Select the new provider/protocol from the drop-down.
7. *Optional:* Enter a phone number and click **Call Now** to test the integration.
8. Click **Finish** to save changes.

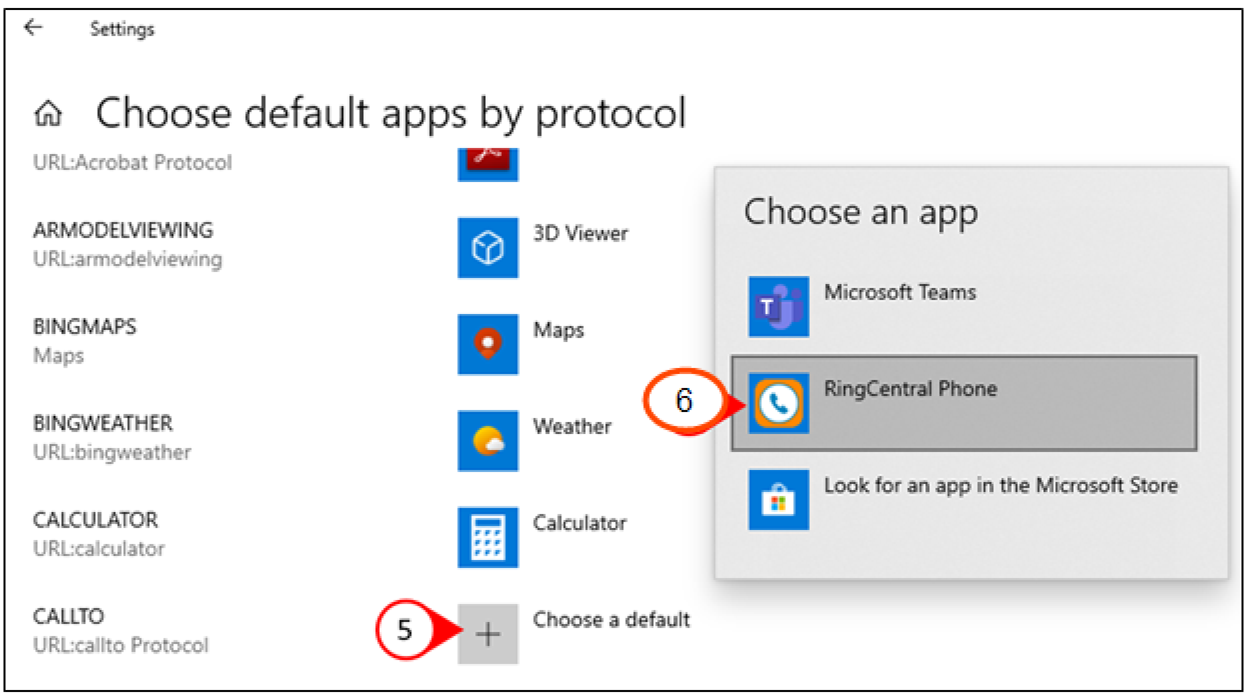
To pair your phone to CallTo or Tel in Windows

For agencies/users with either **CallTo** or **Tel** selected as the phone provider/protocol, the CallTo or Tel protocol must be set to open the phone system within Windows.

1. Open the **Start Menu** on the user's workstation.
2. Search for "**Default apps**".
3. Click "**Choose default apps by protocol**".
4. Locate the **CALLTO** or **TEL** protocol.

> The list of protocols is sorted alphabetically.

5. Click on "**Choose a default**" next to the CALLTO or TEL protocol.
   a. If an app is already selected as the default, click the app icon instead.
6. Click the user's phone application.



Comparative Raters Overview

The HawkSoft Client Management System provides tools for integrating CMS with comparative rating programs. Depending on the vendor your agency works with, the integration may be one-way or two-way.

- **One-way integration** – Enables your agency to seamlessly pass client and policy information to the rater for quoting new business or re-rating current clients. These "one-way" bridges transfer information to or from CMS, but not both directions.
- **Two-way integration** – Enables CMS to send client and policy data to the rater, and from the rater back to CMS. Using these bridges reduces the amount of time spent entering data and can significantly increase productivity.

Comparative Raters

AccuAuto Web Rater Integration

ACS 2000 Rater Integration

Applied Rater Integration

Capital Evolution Rater Integration

EZLynx Rater Integration

FSC Rater Integration

IBQ Rater Integration

ITC TurboRater Integration

PL Rating Integration

Quomation PowerQuote Integration

QuoteRush

SinglePoint Integration

The HawkSoft Importer

IVANS Market Appetite

HawkSoft CMS integrates with IVANS Market Appetite to enable you to quickly identify markets for commercial lines risks directly from CMS.

IVANS Market Appetite is easy to use. Simply click the link provided in CMS to view a list of carriers with an appetite for a specific risk in your client/policy.

You can easily access the IVANS Market Appetite website from within the client policy or from the CMS toolbar.

This task is typically performed by an Owner/Administrator, Manager, or CSR/Producer.

> Required Permissions:
> To perform this task, no specific CMS user permissions are required.

In this topic:

Subscribing Markets	Sign Up
Access IVANS Market from a Client/Policy	Access IVANS Market from the CMS Toolbar

Subscribing Markets

The following list includes current IVANS Market Appetite carriers:

> New carriers are added to this list periodically.

- Affinity Nonprofits
- Affinity Travel
- Amerisure
- AmTrust
- Aon Attorneys Advantage
- Attune
- Bankers Insurance

- Berkshire Hathaway GUARD
- Brownstone
- Central Insurance
- CNA
- Employers
- Encova/Motorists
- Hagerty
- Hanover
- Hiscox
- HSB (Hartford Steam Boiler)
- Huntington T. Block
- Ian H. Graham
- Insurmark
- JM Wilson
- K&K Insurance
- Main Street America Group
- MiniCo
- Missouri Employers Mutual
- Nationwide
- Nonprofits Insurance Alliance
- Pekin
- Quincy Mutual
- State Auto
- Travelers

To sign up

Before using IVANS Market Appetite, you will need to sign up with your agency's account information.

> If your agency does not have an IVANS account, see IVANS Transfer Manager for more information.

1. Access IVANS Market Appetite from a client policy or from the CMS toolbar (see below).

   The **IVANS Request Registration Email** dialog opens.

2. Complete the registration information.

   - IVANS finds a match between your email domain and a *single* existing Y-Account.
     - You should receive a verification email.
     - Once you verify your email, you will have access to IVANS Market Appetite.
   - IVANS does NOT find a match between your email domain and a single Y-Account OR your email domain matches multiple Y-Accounts.
     - The **Confirm Your Agency** dialog opens.

       Enter your agency **Y-Account**, **Mailbox Number** and **Password**, and then click **Confirm**.

       > If you don't know your Y-Account information, click the **Request Assistance** button.
       >
       > Complete the information fields on the Request Assistance Page to send an email to the IVANS Support Team.

Access IVANS Market Appetite from a Client/Policy

A **Launch Market Appetite** link is available from the **Name and Address** and **General Policy Information** screens when the **Business** check box is selected on the Name and Address screen. Click this link to open the IVANS Market Appetite website with search results displayed, according to the **NAICS** and **State** entered on the Name and Address screen. These results will tell you which carriers have "an appetite" for this risk, and which Line of Business it would be written under.

Access IVANS Market Appetite from the CMS Toolbar 

The IVANS Market Appetite button is available from the **CMS Toolbar**. Click this button to launch the IVANS Market Appetite website and perform a search for carriers who have "an appetite" for a specific risk.

> To remove this button from your toolbar, remove the setting in User Preferences.

Related Topics

Client Name and Address Information
General Policy Information
IVANS Transfer Manager
Tour of the CMS Start Page

Agent Portal Setup

HawkSoft Agent Portal enables you to access client and policy information stored in CMS from your web browser. Because it is optimized for mobile devices, you can use Agent Portal on your phone or tablet to quickly and securely access the information you need on the go.

This topic walks you through the steps to enable and set up Agent Portal for your agency.

For information on accessing and using this feature, see Agent Portal.

In this topic:

Before You Begin	Agent Portal Setup

Before you begin

Before enabling HawkSoft Agent Portal, you must first register for the HawkSoft Marketplace and enable HawkSoft Data Syncing so the application can access your HawkSoft data.

Your email address must be listed on the HawkSoft License Agreement as a main contact.

Register for the HawkSoft Marketplace

The HawkSoft Marketplace offers agency managers the option to enable HawkSoft Data Syncing, purchase and configure HawkSoft products, and integrate with third-party applications.

1. Click the **Settings** icon on the the HawkSoft CMS toolbar, and then select **Marketplace**.
2. Click **Register Now**.
3. Enter your **Email Address**, and then click **Submit**.

   Your email address must be listed on the HawkSoft License Agreement as a main contact. If you receive an error indicating your email address is not listed as a main contact, or your current email address is different than the one used for the HawkSoft License Agreement, please have your agency owner contact billing@hawksoft.com to update your information, and then try again.

   An **Authentication Code** is sent to your email address.
4. Copy the code from the email and paste it into the corresponding field on the Marketplace registration window.
5. Check the box below the Authentication Code field stating you agree to the **Terms and Conditions for HawkSoft Marketplace**.
6. Click **Submit**.

   A confirmation message appears.
7. Close the HawkSoft Marketplace Registration screen.

   You are ready to enable additional HawkSoft products and third-party applications.

Enable HawkSoft Data Sync

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:

Setup > General Configuration Settings

See Setting User Permissions for more information.

1. Click the Settings icon, and then select **Marketplace**.

   If you haven't registered for the Marketplace, see HawkSoft Marketplace for detailed instructions.

2. Click and read the **HawkSoft Terms and Conditions** in the *HawkSoft Data Sync* section, and then check the box to accept the Terms and Conditions.
3. Click **Activate**.

   The **HawkSoft Cloud Confirmation** window opens.

4. Click **Confirm**.

   A confirmation message appears.

5. Click the **Return to Marketplace** button.

Enable the HawkSoft Agent Portal

Once you've registered for the HawkSoft Marketplace and Data Sync is enabled, you can register for Agent Portal through the Marketplace.

1. Access the HawkSoft Marketplace through one of the following methods:
   a. Click the **Settings** icon from the CMS toolbar, and then select **Marketplace**. You are logged into the Marketplace automatically.

      OR

   b. Navigate to https://marketplace.hawksoft.cloud/ in a web browser.
      i. Enter your username in the following format: ***[CMS User Initials]@[Agency ID]***

         For example, if you log into HawkSoft using the initials *ABC*, and your Agency ID is *12345678*, enter *ABC@12345678* as your Username.

         Your Agency ID can be found on the login page of HawkSoft CMS.

ii. In the **Password** field, enter the same password you use to log into HawkSoft.

iii. Click **Sign In** to log into the Marketplace.

2. Under HawkSoft Agent Portal, click **Activate**.
3. On the product page for Agent Portal, click **Subscribe**.

Set User Permissions

Once HawkSoft Agent Portal is enabled, users are given access by default. Remove the following permissions for any user you do not want to access Agent Portal:

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Allow Agent Portal Access
>
> See Setting User Permissions for more information.

Related Topics

HawkSoft Marketplace
Policy/Company Setup Overview
Client Search Overview
Agent Portal

Insurance Agent App

HawkSoft integrates with Insurance Agent Mobile® to help agencies engage and retain clients on a mobile application platform. Your clients can conveniently view their profile and policy information at any time.

See Insurance Agent for more information about the Insurance Agent Mobile product.

This article is intended to help you purchase and/or activate Insurance Agent Mobile through the HawkSoft Marketplace.

In this topic:

Before You Login	Purchase and/or Activate Insurance Agent Mobile	Sign in to Insurance Agent Mobile

HawkSoft encourages your agency to make an effort to clean up client data to make it consistent, complete, and accurate.

See Best Workflow Practices and Cleaning up Agency Data.
Most important for Insurance Agent Mobile:

Data Replace Using Advanced Reports

Linking Personal Profiles with Missing Contact Information

Insurance Agent Mobile Rules for Importing Data

Before you begin

Before using the Insurance Agent Mobile application, you must first register for the HawkSoft Marketplace, and enable HawkSoft Data Syncing so the application can access your HawkSoft data.

Your email address must be listed on the HawkSoft License Agreement as a main contact.

It is recommended that your agency processes downloads each day to keep your data current in the IAM application. See Best Practices: Download Settings for more information.

Register for the HawkSoft Marketplace

The HawkSoft Marketplace offers agency managers the option to enable HawkSoft Data Syncing, purchase and configure HawkSoft products, and integrate with third-party applications.

1. Click the **Settings** icon on the the HawkSoft CMS toolbar, and then select **Marketplace**.
2. Click **Register Now**.

3. Enter your **Email Address**, and then click **Submit**.

   Your email address must be listed on the HawkSoft License Agreement as a main contact. If you receive an error indicating your email address is not listed as a main contact, or your current email address is different than the one used for the HawkSoft License Agreement, please have your agency owner contact billing@hawksoft.com to update your information, and then try again.

   An **Authentication Code** is sent to your email address.

4. Copy the code from the email and paste it into the corresponding field on the Marketplace registration window.
5. Check the box below the Authentication Code field stating you agree to the **Terms and Conditions for HawkSoft Marketplace**.
6. Click **Submit**.

   A confirmation message appears.

7. Close the HawkSoft Marketplace Registration screen.

   You are ready to enable additional HawkSoft products and third-party applications.

Enable HawkSoft Data Sync

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > General Configuration Settings
>
> See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Marketplace**.

   If you haven't registered for the Marketplace, see HawkSoft Marketplace for detailed instructions.

2. Click and read the **HawkSoft Terms and Conditions** in the *HawkSoft Data Sync* section, and then check the box to accept the Terms and Conditions.

3. Click **Activate**.

   The **HawkSoft Cloud Confirmation** window opens.

4. Click **Confirm**.

   A confirmation message appears.

5. Click the **Return to Marketplace** button or close the Marketplace window.
6. Restart CMS.
7. Upon restart, your agency's files begin to sync instantly. You can work in CMS while your files sync.

Monitor the progress

If you are curious to see what is happening with your data during the initial synchronization or anytime after, click the Settings icon, and then select **General Configuration**. Select the **HawkSoft Data Sync** tab, and click the **Show HawkSoft Cloud Manager** button to view details.

This utility enables you to see the progress of your sync, and you can also pause and re-start the synchronization process if needed.

The top section of the screen displays information such as the path to your client files, your Agency ID, the count of remaining files to process, and the status of the synced files.

The History information displays the date, time, synchronization status, client file ID, and the computer from which the sync was run for each file.

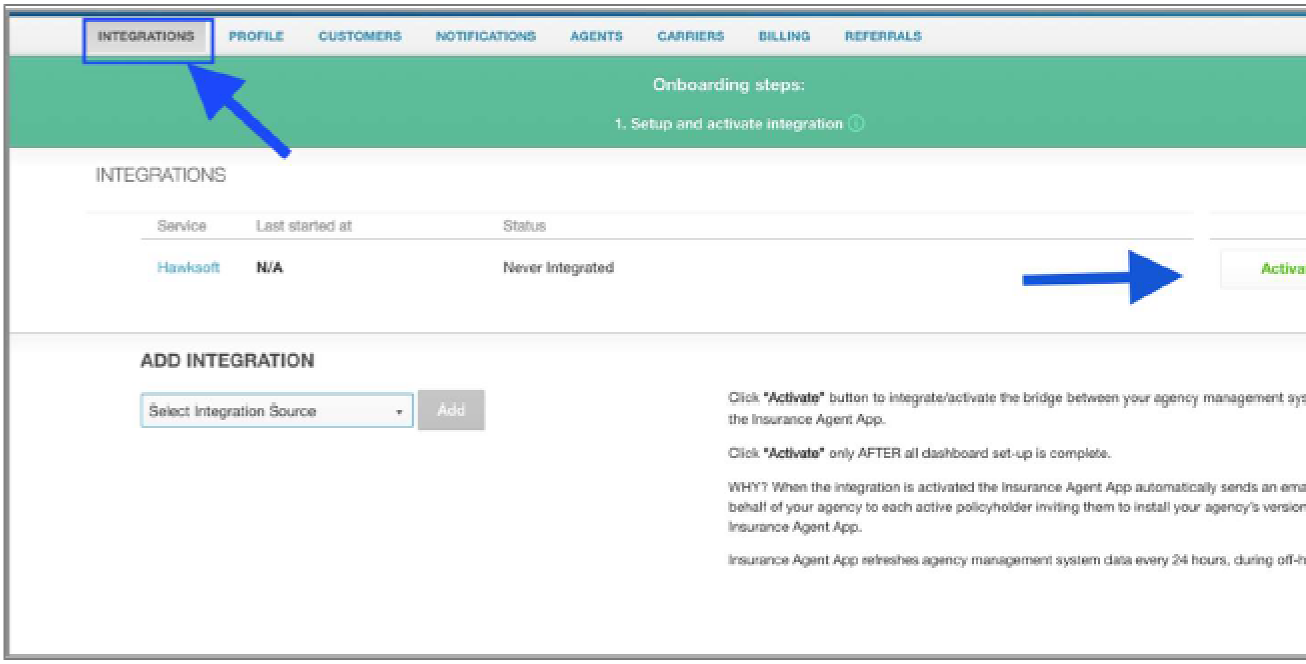
To purchase and/or activate Insurance Agent Mobile

1. Click the **Settings** icon on the main CMS toolbar, and then select **Marketplace**.
2. Scroll down to the **Insurance Agent Mobile** product and agree to the **Terms and Conditions**.
3. Click **Share Data**.
4. Activate your Insurance Agent Mobile account.

   New customers: Register to create your Insurance Agent Mobile account.

Existing customers: Click the **Sign In** button in the Insurance Agent Mobile section of the Marketplace.

a. Select the **Integrations** tab.



b. Select **HawkSoft** from the **Add Integration** drop-down.

c. Enter the HawkSoft Contract License #.

> To find your license number, click the at the top of the CMS Start page, and then select **License Info**. The HawkSoft Contract ID is the license number.

d. Click **Activate**.

Contact Kiki@InsuranceAgentApp.com or support@InsuranceAgentApp.com if you have any questions about on-boarding, setup, or training before you click Activate.

Your agency's initial data synchronizes overnight. After the initial sync is complete, the sync process continues to pick up changes made in CMS. These changes are reflected in the Insurance Agent Mobile application within 8 to 24 hours.

> It is recommended that your agency processes downloads each day to keep your data current in the IAM application. If you don't process downloads every day, updates won't be sent to the IAM application every day See Best Practices: Download Settings for more information.

To sign in to Insurance Agent Mobile

Once you have activated your account, simply click the **Sign In** button in Marketplace to access your Insurance Agent Mobile account or simply bookmark the website for future access.

Related Topics

- Best Workflow Practices
- Best Practices: Download Settings
- Cleaning up Agency Data
- HawkSoft Marketplace
- HawkSoft Integrations and Product Add-Ons
- Insurance Agent Mobile Rules for Importing Data
- Linking Profiles with Contact Information
- Personal Profiles with Missing Contact Information

Marketing (API) Solutions Overview

HawkSoft CMS enables agencies to integrate with third-party marketing solutions companies. These companies may provide a variety of marketing services, including the management of drip campaigns, email marketing, and social media presence.

AgencyBuzz

AgencyBuzz® is "web-based audience engagement" marketing software created by Insurance Technologies Corporation (ITC). AgencyBuzz integrates with CMS to enable agencies to automate their email and social media marketing programs by accessing client information directly from CMS.

AgencyBuzz

Agency Revolution

Hawksoft CMS supports direct integration with Agency Revolution's automation software, Fuse™. Hawksoft customers that use Fuse™ will be able to micro-segment and automate email, direct mail, and text messages to their clients based on the information stored in Hawksoft CMS. To learn more about this integration, please contact Agency Revolution.

Agency Revolution

Generic/Website Integration

HawkSoft CMS includes a generic data importer that enables users to import data using one of the data formats listed below.

Website Integration Builders

HawkSoft has assisted several insurance agency website design companies to understand how to set up website integration with HawkSoft. These companies include:

Alicor: http://www.alicorsolutions.com/

SmartHarbor: https://smartharbor.com/

This article is intended for IT and software or website developers that have been tasked with sending data to CMS.

In this topic:

Moving Data Into CMS

Moving data into CMS from a website

1. Place a link on your webpage to a file as defined with one of the Generic/Website Integration below.

   Ensure that the link uses the correct extension as defined by that file format.

2. Click on the link for that file.

   Windows automatically launches the program associated with that file extension.

   HawkSoft CMS registers those file extensions so that HawkSoft Importer will be launched.

3. Select one of the following options:
   - Create a New Client
   - Create a New Policy on an Existing Client

- Update a Policy on an Existing Client

Moving data into CMS from an email

1. Attach a file to an email as defined with one of the Generic/Website Integration below.

   Ensure that the attached file uses the correct extension as defined by that file format.

2. When the email is received, double-click on the attachment to automatically launch the program associated with that file extension.

   HawkSoft CMS registers those file extensions so that the HawkSoft Importer will be launched.

3. Select one of the following options to update your CMS data:

   - Create a New Client
   - Create a New Policy on an Existing Client
   - Update a Policy on an Existing Client

Supported file formats

HawkSoft CMS supports the following file formats:

ACORD XML

- **Lines of Business** – Personal Auto, Business Auto, Home, and Dwelling Fire.
- **File Format** – XML file format defined and licensed by ACORD.

  Sample File

- **Documentation** – ACORD XML is a standardized insurance industry data transfer format. Contact ACORD at http://www.acord.org for documentation and licensing information.

Launching the ACORD XML

Launch file with `.CMSACORDXML` extension.

> HawkSoft associates the file extension `.CMSACORDXML` so that launching one of these files automatically launches the HawkSoft Importer.

AL3 (ACORD Level 3)

- **Lines of Business** – Personal Auto, Business Auto, Home, Dwelling Fire, CGL, Commercial Property, Workers' Comp, Umbrella, Commercial Umbrella, Inland Marine, BOP, or Crime.
- **File Format** – Structure based binary file (AL3 is an industry standard file format for transferring insurance data.)
- **Documentation** – ACORD AL3 is a standardized insurance industry data transfer format. Contact ACORD at http://www.acord.org for documentation and licensing information.

Launching the AL3

1. Launch file with a `.CMSAL3` extension.

   > HawkSoft associates the file extension `.CMSAL3` so that launching one of these files will automatically launch the HawkSoft Importer.

2. Launch CMS as follows: CMS.EXE /AL3 (filename).

Tagged file format

The Tagged file format is similar to an INI file.

- **File Format** – Tagged file format can be viewed by opening the CMSMTF file in notepad.

  Fieldname = value

  Example:

  - gen_sLastName = Dali
  - gen_sFirstName = Salavador

- **Documentation** – Auto File Format; Auto Sample File; Home File Format; Commercial File Format.

Launching the Tagged File Format

Launch file with a `.CMSMTF` extension.

> HawkSoft associates the file extension `.CMSMTF` so that launching one of these files will automatically launch the HawkSoft Importer.

Related Topics

Data Importer
The HawkSoft Importer

User Setup Overview

Before getting started using HawkSoft, it is important to get your User Profile and your workstation configured to ensure success using HawkSoft.

Workstation Setup

HawkSoft CMS enables you to easily configure each workstation to access and use HawkSoft CMS. Some settings are required, such as mapping to the network drive and setting folder locations. Others, like setting up external tools, and some computer-specific settings, are optional. This section of

CMS Help describes how to set up workstations and modify computer specific settings for your workstation.

Workstation Setup Overview

My User Profile

Now that your administrator has created your profile, it is important for you to complete your user information and configuration settings to ensure your success using HawkSoft.

My User Profile

Customize Your Database

Customization Options

HawkSoft CMS offers a variety of ways to customize your management system to suit your agency's workflows, as well as options for customizing the look of the application.

This article gives an overview of all the options available for customizing HawkSoft CMS.

Customize HawkSoft CMS

Workstation Setup Overview

HawkSoft CMS enables you to easily configure each workstation to access and use HawkSoft CMS. Some settings are required, such as mapping to the network drive and setting folder locations. Others, like setting up external tools, and some computer-specific settings, are optional. This section of CMS Help describes how to set up workstations and modify computer specific settings for your workstation.

See General Agency Configuration for information about settings that affect all users and workstations.

System Information

HawkSoft CMS System Information is located under the Help on the HawkSoft CMS menu bar.

The System Information dialog provides details about your computer, network, and CMS settings.

System Information

Installing HawkSoft on Microsoft Windows

After CMS is installed on the server or networked workstation, each additional workstation at your agency needs to be configured

Installing HawkSoft CMS Using Microsoft Windows

Folder Locations

CMS folder locations define where program settings and data are stored and accessed. Folder locations are computer specific and are configured on each workstation when running Workstation Setup.

Folder Locations

Computer Specific Settings

Computer specific settings apply to the Windows user profile logged in. These settings include options for several CMS features, such as what programs to use when viewing images and PDFs, installing the Virtual Printer, and printer settings.

Computer Specific Settings [+Video]

Setting Up External Tools

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

Shortcuts to External Tools [+ Video]

System Information

HawkSoft CMS System Information is located under the Help on the HawkSoft CMS menu bar.

The System Information dialog provides details about your computer, network, and CMS settings.

In this topic:

Permissions	Folder Size
File Versions	Locations

System Information details

- **Windows Version**

  The Windows® operating system that is installed on the computer.

- **Computer Name**

  The name assigned to the computer.

- **IP Address(es)**

  The IP (Internet Protocol) address of the computer.

- **User Name**

  The profile name entered to log into Windows.

- **Drives**

  Provides you with a snapshot of all the drives set up on the computer.

- **Current Directory**

  The path from which the HawkSoft program files are running.

- **Install Directory**

  The directory the program was installed to.

- **Haw Folder**

  The location of the HAW folder. The Haw folder contains the HawkSoft CMS application, and its related components.

- **Component Path**

  The location of CMS Configuration settings files. These paths will vary, depending on your computer operating system.

  Example: C:\Users\[username]\AppData\Local\HawkSoft\CMS

Configuration Setting Files:

- Cache folder (Cache location for Policy\Company configuration settings)
- Export folder (Rater XML files)
- HAWK.INI
- HawkLink.INI
- LogViewSpellCheck.INI
- NETWORK.INI

- **Base Config File**

  The default path to the HAWK.INI. These paths will vary, depending on your computer operating system.

  Example: C:\Users\[username]\AppData\Local\HawkSoft\CMS\HAWK.INI

- **Config file**

  Location where the active configuration file is stored.

- **CMS Version**

  This is the version of HawkSoft CMS that is currently running.

  > This CMS version should match on all workstations. Multiple CMS versions might create multiple HAW folders.

- **CMS Instances**

  The number of instances of CMS running on this computer.

- **IE Version**

  The version of Internet Explorer running on this computer.

Permissions

System Permissions represent local computer settings assigned by an agency system administrator to control access to various components of the network. If the **Result** column for any Permission item is marked as **Failed**, it typically indicates that the user's access to this component is restricted. This does not necessarily mean CMS will not run.

- **Windows\System32**

  Indicates whether or not the user logged in to Windows has administrative rights to the Windows System32 folder.

  If the Result column displays **Failed**, the user will not be able to install HawkSoft CMS components. This does not prevent CMS from running.

- **Haw\Agency Folder**

  Indicates whether the user has read\write permissions to the Haw\Agency folder. If the Result column displays **Failed**, CMS will not run.

- **Client Folder**

  Indicates whether user has read\write permissions to the Haw\Client folder. If the Result column displays **Failed**, CMS will not run.

- **Config File**

  Indicates whether user has read\write permissions to HAWK.INI. If the Result column displays **Failed**, CMS will not run.

- **HKey_CLASSES_ROOT**

  If the Result column displays **Failed**, the user will not be able to install HawkSoft CMS components. This does not prevent CMS from running.

- **HKEY_LOCAL_MACHINE**

  If the Result column displays **Failed**, the user will not be able to install HawkSoft CMS components. This does not prevent CMS from running.

  > Component installation does not apply to HSO users.

File Versions

This window displays a list of installed CMS, Windows, and third-party .DLL and .EXE files. CMS uses an internal code to verify the correct version for these files.

The column reflecting the "Correct Version" of the program file is based on the current installed version of CMS. Incorrect versions of a program file are displayed in red.

In the case of third-party applications, CMS cannot determine whether the installed version is the most recent.

There are seven column headers:

- Name
- Size
- Date Modified
- Installed Version
- Correct Version
- Company

Click on any header label to sort the report by that information.

From a troubleshooting standpoint, we are only concerned with those files where HawkSoft, Inc. is listed as the Company.

> WSSetup.exe does not get updated with every CMS version update so it is not a problem for it to display in red.

Folder Size

The Folder Size Information window displays:

- A list of all sub-folders in the HAW folder
- The number of files in each sub-folder
- The total size of the HAW folder and sub-folders

Locations

The System Folder Locations dialog displays system folder locations for all networked users. It is primarily used to determine where the CMS files are stored.

- The **File Location** drop-down contains the following seven paths:
  - Archive Path
  - Client Path
  - Download Path
  - Haw Path
  - Images Path
  - Inbox Path
  - WAN Path

  Select one of the above options to view the path for the corresponding folder.

- **System Folder Locations**

  Column header definitions:

  - **Computer**

    The computer name of each networked computer that is currently logged into HawkSoft.

  - **Username**

    The windows user profile name for each user logged in.

  - **Actual Path**

    This is the path the associated user is mapped to for each File Location drop-down item.

  - **Resolved Path**

    This is the UNC path.

    Example: \\Server\DATA\HawkSoft.

- **Reset All**: Details displayed on this list do not get updated automatically, so if for instance a user is given a new computer, both the old and new computer will be displayed here.

  - Click **Reset All** to clear the information on all seven path lists.
  - The list refreshes with each user's current information as they log out of CMS.

Related Topics

Folder Locations

Installing HawkSoft CMS Using Microsoft Windows

In this topic:

Compatibility Checker	Workstation Setup (Quick Start Guide)

After HawkSoft CMS is installed on the server or networked workstation, each additional workstation at your agency needs to have required components installed.

HawkSoft CMS includes a Workstation Setup Wizard, called "WSSetup.exe", that will automatically install required components and create the CMS shortcut for you.

This article describes the process of installing HawkSoft CMS to each workstation.

> Required Permissions:
> No specific CMS user permissions are required to perform this task. However, all client workstations must be networked to the server or workstation that has CMS installed. The client workstations must have full read/write and modify permissions to the Haw folder on the server/workstation that has CMS installed, and must have a mapped network drive pointing to the Haw folder.

To run Compatibility Checker (optional)

The Compatibility Checker is found on the HawkSoft, Inc. website and ensures that the workstation has the minimum required components before running WSSetup.exe.

1. Go to the HawkSoft, Inc. Home Page.
2. Click **Support** > **System Requirements**.

   > Paste the following URL into your browser so you can leave these instructions open in this window: **https://hawksoftinc.com/agency-management-system/system-requirements**

3. Click on the **Compatibility Checker** link, and then click **Run**.

   The **HawkSoft CMS Compatibility Checker** dialog opens.

   A list of Required Components appears with green check marks.

4. Click **Install Now** if a red X appears next to any of the components.
5. Click **Close**.

To run Workstation Setup

1. Open the Windows File Explorer.
2. Locate the shared network drive that contains HawkSoft CMS in a folder named **HAW**.

For example: **Z:\Haw**.

3. Open the HAW folder, and then double-click **WSSetup.exe**.

   The **HawkSoft Updater** dialog opens.

4. Choose the **HawkSoft CMS** location where the program source files are stored.

   The location defaults to the path from Step 2.

5. Click **Next**.

   The **Select Icons to install** options appear with the **On Desktop** option selected by default.

   Additional options are available if the **Terminal Services/Citrix Client** setting is selected in General Configuration.

6. For agencies with Terminal Services, determine how CMS will be installed on this workstation.

   > This option appears only when CMS has been installed on a Terminal Server.

   - **This computer is a client workstation** – Select this option to configure this workstation to run CMS in the Windows user's local AppData folder.

     Program files are copied from the server to the local workstation directory. This configuration enables the program to run on each workstation, rather than across a network. The computer still requires a connection to the server to retrieve client and agency data.

   - **This computer hosts the CMS program (Terminal Server)** – Select this option if CMS will be accessed on this computer remotely, with this computer acting as a server for other users to connect to using terminal services such as Microsoft Remote Desktop/RDP.

7. Click **Update**.

   If Workstation Setup previously ran on this workstation, a confirmation message appears.

   Click **Yes** to update the Haw Path.

   Updating HAW path configures Folder Locations for you.

   See Folder Locations for more information.

   If your workstation does not have the minimum required Microsoft components installed, CMS will install these components.

   The **Setup Complete** dialog opens.

8. Click **Finish**.

After HawkSoft CMS is installed on the server or networked workstation, Workstation Setup (WSSetup.exe) needs to be run on each additional workstation at the agency to install required components and create the CMS shortcut.

Related Topics

Logging In and Out of HawkSoft CMS
Folder Locations
Workstation Setup Overview

Folder Locations

CMS folder locations define where program settings and data are stored and accessed. Folder locations are computer specific and are configured on each workstation when running Workstation Setup.

See Installing HawkSoft CMS Using Microsoft Windows for more information.

Folder locations are typically configured by an Owner/Administrator or Manager.

Folder locations should be verified:

- When setting up workstations
- When CMS has been moved to a new server
- If problems arise when trying to retrieve client data

Folder location settings are critical to proper software functionality. HawkSoft, Inc. recommends that you contact HawkSoft Support to verify your settings if you have any questions or concerns.

In this topic:

Folder Types and Paths	Modify Folder Locations

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Folder Locations

Even with the Folder Locations permission selected, access to this function is blocked when **Terminal Services/Citrix Client (Local)** has been selected in General Settings.

See Setting User Permissions for more information.

Folder types and paths

Folder Path	Description
Client Path	The shared network location where the client files reside.
Haw Path	The shared network location where HawkSoft CMS is installed for the agency.
Images Path	Location of items attached to clients and policies. This path should be in a **UNC** (Universal Naming Convention) format on most network configurations. **For example**: `\\servername\shared\Haw\Images` Optional: Click **Multiple Image Paths** to create additional image folder locations.
Rater Path	Location for transferring quote data to a locally installed Rater.
Unmatched Documents Inbox	Default location where unattached images are initially stored until they are assigned to a client/policy. This path is set up automatically.
Unmatched Downloads Inbox	Location where unmatched carrier downloads are stored until manually processed.

To modify folder locations

1. Click the **Settings** icon, and then select **Folder Locations**.

   The **HawkSoft Folder Locations** dialog opens.

2. Select a folder location and select one of the following options:
3. The **Images Path** should be a Universal Naming Convention (UNC) path to the shared installation of CMS for the agency. If you enter a mapped drive for the images folder location, you will be prompted to use the UNC path.

   Optional: Click **Multiple Image Paths** to create additional image folder locations.

   - Click **Edit** to change the path where the selected folder is stored.

     Modify all folder locations from the **Haw Path**. Click **Browse** to select a new path, and then select **Use as Base Path** to set this path as the root path for all other folder locations. No other folder locations need to be set up.

   - Click **Explorer** to view the selected folder path in Windows Explorer.
   - Click **System Info** to view CMS version and computer information.

     See System Information for details.

   - Select **Use Separate Archive Path** to store archived client files in an alternate location other than the Client Path.

     All computers must be set to access the same archive path and folder.

     HawkSoft Inc. recommends enabling this setting for databases with over 10,000 client files to reduce processing time when running CMS reports.

   The **Current Directory**, listed at the bottom of the **Folder Locations** dialog, reflects the path from which CMS program files are running.
4. Click **OK** to close the **Edit Path** dialog.
5. Click **OK** to close the **HawkSoft Folder Locations** dialog.

Related Topics

Installing HawkSoft CMS Using Microsoft Windows
General Settings

Computer Specific Settings [+Video]

Computer specific settings apply to the Windows user profile logged in. These settings include options for several CMS features, such as what programs to use when viewing images and PDFs, installing the Virtual Printer, and printer settings.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Computer Specific Settings
>
> See Setting User Permissions for more information.

To access Computer Specific Settings

Click the **Settings** icon, and then select **Computer Specific Settings** from the main CMS menu bar.

Image (TIF/JPG) File Viewer – Select the program used to view TIF or JPG images within CMS.

Scanner Control – If using a TWAIN compliant scan driver, select one of the following options that works with your drivers:

> It is best to leave this option on the Default (Version 7) setting unless instructed by your tech or HawkSoft representative.

- Basic (Version 7)
- Default (Version 7)
- Enhanced (Version 8)

- Windows Image Acquisition (WIA) – Select WIA only if using a WIA Scan Driver (not recommended).

Unmatched Documents PDF Viewer – Select a default viewer to open PDFs.

The most commonly used are Adobe Acrobat Reader (Internal) and Tracker XChange Viewer (Internal).

Remember Last Printer Used – Selecting this option defaults the printer to the last one used when printing from the Action menu.

Show Start Page on start up – If this option is checked, the CMS Start Page opens when logging into CMS.

If this option is not checked, CMS opens with a blank screen.

Compress image on attach – If this option is checked, TIF images attached to the client file from the Unmatched Documents Inbox are automatically compressed using TIF level 4 compression. This will reduce the size of the TIF image files and improve the use of disk space on your server/workstation if images added to CMS are in TIF format.

Exlude this computer from managing the cloud synchronization process - This option is available only when your agency has enabled. If this setting is checked, files will not upload to the HawkSoft Cloud Servers from this workstation. All updated client data will still be uploaded by other workstations that have HawkSoft CMS running at your agency. Agencies may want to check this setting for workstations configured through a VPN connection (not supported), or workstations experiencing network/internet slowness issues.

For synching to occur, at least one workstation must leave this setting un-checked.

See for more information.

For information about managing the synchronization process, see .

A restart of CMS is required if you check the **Exclude this computer from managing the cloud synchronization process** box, to ensure that the Cloud Manager upload does not run.

Install/Uninstall Virtual Printer – Opens the Virtual Printer Manager.

Follow on-screen prompts to reinstall or uninstall Virtual Printer.

Reset Printer Settings – Resets the default printer selected in CMS to the Windows® default printer.

Related Topics

Client and Policy Documents Overview
Shortcuts to External Tools [+ Video]
The HawkSoft Virtual Printer

Shortcuts to External Tools [+ Video]

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

> External tools can launch applications only if the application is installed on the same computer CMS is running on.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Setup > Computer Specific Settings
>
> See Setting User Permissions for more information.

In this topic:

Set up a website or program	Additional button options

To set up a website or program

1. Click the **Settings** icon, and then select **Computer Specific Settings** from the main CMS menu bar.

The **Computer Specific Settings** dialog opens.

2. Click the **External Tools** tab.
3. Click **New** to set up a new external tool, and complete the following:
   - **Tool Name** – Name the external tool.
   - **Tool Type** – Select **Program** (application) or **Website** from the drop-down list.
   - **Tooltip** – Enter the tool name as you want it to appear when you hover your mouse over the toolbar icon.
   - **Help Text** – Enter a description of the tool. This can include the keyboard shortcut associated with the toolbar button.

     This description appears as part of the Tooltip when you hover your mouse over the toolbar icon.
   - **Command** – Enter or browse to the program (application) path or website URL:
     - For a website, enter the URL
     - For a program, enter the path to the .exe file

       See the following table for a list of common programs and commands:

Tool Name	Command
Excel	Excel
Outlook	Outlook
Word	Winword

Tool Name	Command
PowerPoint	Powerpnt
Chrome	Chrome
Internet Explorer	iexplore
DS-Pro	DS-Pro
Publisher	mspub

- **Arguments** – Use to send command line arguments to the EXE. (Optional: Used only when the tool type is Program.)
- **Initial Directory** – This field automatically defaults to the same path as the Command field. (Optional: Used only when the tool type is Program.)
- Select **Show on Tools Menu**, **Show on Quick Launch Panel**, and/or **Show on Toolbar** to designate where links to the tool appear.

4. Click **Test** to verify your setup.

   Your program or website launches.

5. Click **OK** to save changes and return to the **External Tools** screen.
6. Click **OK** to close the Computer Specific Settings dialog.

   A link to the new tool displays in CMS at the designated location.

Additional button options on the External Tools screen

- **Edit** – Highlight an item from the list, and then click **Edit** to modify.
- **Delete** – Highlight an item from the list, and then click **Delete** to remove the link.
- **Arrows** – Highlight an item from the list, and then click the Up or Down arrow to move the items up or down on the list.
- **Separator** – Click to insert a dividing line that displays between external tools you have designated to show on the main CMS toolbar. If selected, CMS adds a separator to the bottom of the external tools list, and then you can use the navigation arrows to place the separator.

Related Topics

Customizing the CMS Toolbar

My User Profile

Once you have installed HawkSoft on your workstation, and you have logged into HawkSoft, you are ready to complete your User Profile. It is important for you to complete your user information and configuration settings to ensure your success using HawkSoft.

Some of your user settings have been set by your administrator. The following table lists each of the settings and indicates which settings you have access to and which settings your administrator may have configured for you.

Profile Settings	By Admin	By User
General: User Name and Password	✓	✓
User Permissions	✓	

Profile Settings	By Admin	By User
User Preferences	✓	✓
Contact Information	✓	✓
Agent Signature		✓
Commissions	✓	
Calendar		✓
Email	✓	✓
Text Messaging *(additional permission required)*	✓	✓
E-Signature *(additional permission required)*	✓	✓
Phone Dial-Out Integration *(Initial Admin setup required)*	✓	✓
Batch Email *(additional permission required)*	✓	✓

You might not have access to settings marked with a green checkbox. Permissions to these settings are managed in User Permissions by your administrator.

For information on entering a new user in HawkSoft as an administrator, see Manage Agency Users.

No permissions are required to update your own User Profile.

See Setting User Permissions for more information.

No permissions are required to update your own User Profile.

See Setting User Permissions for more information.

User Profile Tabs

In your User Profile, you will see a series of tabs available for you to enter your contact information, set user preferences for your search and view options, import a user signature, and configure email and text messaging. Setup is usually completed in sequence, starting with the General tab.

To complete your User Profile

1. Click the **Settings** icon, and then select **User List**.

   Your profile opens with the **General** tab selected. Your User initials and name have been entered by your administrator.

   The General tab enables you to change your name, account email, and password.

   > The Account Email is used if you forget your password. To update your email address for customer communication, see Contact Information.

2. (Optional) You can click the **Update Password** button at anytime.
   - A strong password is required for all user profiles.
   - A password must contain at least three of the four following types of characters:
     - Uppercase letter
     - Lowercase letter
     - Number
     - Special character
       - The following special characters are allowed:

         ! - @ # $ % ^ * ( ) + _ < > [ ] '
       - All other special characters, including spaces, are not allowed.
   - Passwords must be at least 8 characters and at most 32 characters.
3. (Optional) You can change your **Account Email** if needed.

   The Account Email is used to reset a forgotten password.

   See General Information to learn more.
4. Finish setting up your profile on the following tabs:

User Preferences

Setting User Preferences enables you to set your own default search parameters when retrieving a client file, as well as control the way CMS organizes client file information, policies, and attachments. Complete the settings on this tab.

For detailed information about each field, see User Preferences.

Contact Information

The Information screen in the User Profile dialog is where your address, contact phone numbers, work email address and notes are stored in CMS.

Information entered here can also be used to flood into form letter, email, proposal, and text messaging templates.

> If your state requires a Producer license number on emails sent to clients, you can enter the license number in the Notes field. Your agency administrator can add a merge field to email templates to include this number. See California Agencies: Agency and Producer License Numbers for detailed steps.

Your Account Email address, entered on the General tab, defaults to the Email address on this tab. You can change the email on this tab if preferable.

When you send an email from within HawkSoft, this email address is used as your return address. The Account Email on the General tab is used for resetting your password.

> The email address cannot be left blank.

See User Contact Information for more details.

Agent Signature

The HawkSoft CMS Electronic Agent Signature enables you to "sign" form letters, proposals, memos, Change Request forms, and most ACORD forms with the click of mouse.

See User Signature Setup or to learn how to import your signature.

Calendar

Calendar integration with CMS makes it possible for you to view, edit, and create calendar items from the Calendar side panel on the Start Page.

See Calendar Integration to learn how to integrate your personal calendar with HawkSoft.

Email

The CMS email feature enables you to send an email from within a client file in CMS. You must have an email entered on the Information tab. Sending an email using CMS creates log note documentation that includes the date, time, sender, recipient, and content of the email in the selected client file.

Email settings might be configured by your agency administrator or IT, or you may need to contact your email provider for the correct settings.

See User Email Setup for detailed instructions to set up your email with HawkSoft.

Batch Email

You can set up Batch Emailing if your administrator gave you permissions. Your administrator might have already completed your setup for you. Once set up, HawkSoft CMS enables mass emailing to customers and prospects in conjunction with Report Generator.

Batch Email Setup [+Video]

Text Messaging

You can set up Text Messaging if your administrator gave you permissions. Configuration options depend on the text messaging tool your agency uses, or can be configured to use a different text messaging provider for yourself.

Text Messaging Integration – Select your text message service provider.

- **HawkSoft Text Messaging**: This is the default integration if your agency administrator has enabled HawkSoft Text Messaging from the Marketplace. If this is the text messaging service you use, no further action is needed on this screen. See About HawkSoft Text Messaging for more information.
- **Bulk SMS**: http://usa.bulksms.com/register/
- **Message Media-New (Email-to-SMS)**: http://www.message-media.com
  Available for HawkSoft version 4.8 and later.

  Message Media (Email-to-SMS): For HawkSoft CMS versions 4.7 and older. Use this option only if directed to do so by Message Media.

E-Signature Setup

You can set up E-Signature if your administrator gave you permissions. HawkSoft CMS integrates with select e-Signature providers to make it easier to send documents directly from CMS to your customers for electronic signature.

If your agency is subscribed to **HawkSoft E-Signature** and you are licensed to use it, the drop-down populates with HawkSoft E-Signature and cannot be changed.

Otherwise, you can select your e-Signature provider from the available drop-down:

- **Original Right Signature** – Available for integration. See E-Signature Configuration: DocuSign or RightSignature for configuration details.
- **DocuSign** – Available for integration. See E-Signature Configuration: DocuSign or RightSignature for configuration details.

See E-Signature Overview

Phone Dial-Out Integration

Only modify the settings in this tab if your phone system is different from the rest of your agency. This dialog does not configure incoming calls.

Phone dial out integration can be configured by your agency administrator in General Configuration Settings. To use the phone integration set up by your administrator, you do not need to do any setup on this dialog.

However, you can click the Override box if you prefer to set up a different phone integration. Use this dialog to override your agency's default Phone Dial-Out Integration.

To configure *incoming* calls, your agency's VoIP software must be configured to launch the CMS ScreenPop application, with arguments for your HawkSoft user initials, password, and the caller's phone number. The steps to do so vary between VoIP providers, and as such it is recommended to have an agency technician assist with incoming call integration setup.

See Phone System Integration for more information.

Once you have completed each of your Profile tabs, click **Finish**.

User Preferences

HawkSoft CMS enables users to set their own default search parameters when retrieving a client file, as well as control the way HawkSoft CMS organizes client file information, policies, and attachments.

Unlike settings made in General Configuration (global settings that affect all users and computers) or Computer Specific Settings (local settings that affect any user logged in to a specific computer), these settings are applied for each user regardless of which computer he or she is using.

This task is optional and is typically the responsibility of the user logged into CMS.

> Required Permissions:
>
> No special user permissions are required to make changes to your own User Preferences.
>
> In order to set up or modify User Preferences for *another user*, user permissions must be set to include:
>
> **Setup** > **User List**
>
> User Permissions override settings made in User Preferences. For example, if your HawkSoft CMS administrator has not given you permission for **Access to Customer Types**: **Commercial**, you will not have access to Commercial customer files, even if you select **Commercial** as a Customer Type in User Preferences.
>
> See Setting User Permissions for more information.

In this topic:

Setting User Preferences

To set user preferences from the CMS menu bar

1. Click the drop-down arrow next to your user name on the CMS menu bar, and then select **User Preferences**.

   The **Preferences** dialog opens.

2. Modify preferences, as needed.

   See User Preferences below.

3. Click **OK** to save your changes and close the **Preferences** dialog.

To set user preferences from the User Profile dialog

1. Click the **Settings** icon, and then select **User List**.

   The **HawkSoft User List** dialog opens.

   > If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. Select a user, and then click **Edit**.

   The **User Profile** dialog for that user opens, with the **General** tab selected.

3. Click the **Preferences** side-tab.
4. Modify preferences, as needed.

   See User Preferences, below.

5. Click **Finish** to close the User Profile dialog.

   > For users without User List permissions, this step closes the User Profile dialog.

6. Optional: Click **Apply** to save the User List changes and add or edit additional user profiles.
7. Click **OK** to close the User List dialog.

To set user preferences from the Search dialog

1. Click the Search button on the main CMS toolbar.

   The **Search** dialog opens.

2. Click **User Preferences** at the bottom of the **Search** dialog.

   The **Preferences** dialog opens.

3. Modify preferences, as needed.

See User Preferences, below.

4. Click **OK** to save your changes and close the **Preferences** dialog.
5. Continue to search for a client, or click **Cancel** to exit the Search dialog.

Preferences dialog

Search

The Search section of the **Preferences** dialog enables you to select default search options when searching for a client. CMS remembers your settings for future searches.

> **Remember Last Used** – This option remembers the most recent setting for the user.

Default Focus – Determines which search field your cursor defaults to in the Search dialog.

Partial Text Search – When checked, enables the user to search with a partial text string, such as a few letters from the client name or part of an address.

Search Archived Clients – Defaults CMS to search for archived client files only.

Open in New Tab – Defaults every client file to open in a new tab after the initial file has been retrieved. This allows you to have multiple client files open at the same time.

Client Type – Enables the user to search for a specific Client Type, or all client types.

Customer Type – Enables the user to search for a specific Customer Type, or multiple customer types.

Status – Enables the user to search for client files with a specific status, or search all client files, regardless of status.

Policy Lookup on Search – Enables the user to select a specific policy to open when the client file is launched. When a client file is selected, the **Choose a Policy** dialog opens. When the client file launches, the policy you select opens automatically.

Settings

Check spelling as you type in Log Notes – When activated, the Spell Check tool automatically checks your spelling in log notes while you are typing.

Show IVANS Appetite button on toolbar – When activated, the **Appetite** button is available on the CMS toolbar. This button links directly to the Market Appetite website enabling you to quickly identify markets for commercial lines risks.

This setting is selected by default. If you don't enter commercial policies, you can uncheck this setting to remove the Appetite button.

See IVANS Market Appetite for a full description of this tool.

Notification Preferences

Enable Notifications - Allows for pop up notifications to appear in the bottom right of your screen to alert you to items such as a new text message.

Enable Notification Sounds - When enabled, pop up notifications play the default Windows sound set for notifications.

On Launch of Customer

These settings affect which policies and logs display when the client file is launched.

Show Active Policies – Determines if active policies display when launching a client file.

> **Include policies active in the last *[x]* days** – Determines if recently canceled/expired policies display when launching a client file. The number of days can be set by clicking the drop-down, or by typing in a specific value.

Show Prospect Policies - Displays prospect policies when a client file is launched.

Show All Canceled/Expired Policies – Displays canceled and expired policies when a client file is launched.

Show Archived Policies – Determines if archived policies display when a client file is launched.

Show Logs for All Policies – Determines if the **Show Logs for All Policies** check box is selected by default in the Log Note window pane. When checked, you can view all log notes regardless of the selected policy.

Default Client Tab – Specifies which tab is initially selected when a client file is launched, such as contacts, policies, or invoices.

See Tour of the Client File for additional information.

Attachments

When a CMS user launches a client file, the Attachment screen displays information organized into specific columns (see Sort Column, below). The following settings enable you to determine how these items are grouped, displayed, and sorted.

Group By – Specifies how attachments are grouped when the attachment list is initially loaded.

Options include:

Remember Last Used – CMS groups attachments based on the grouping last used.

None – Attachments display in order of attachment date, newest to oldest.

Attachment Type – Groups by file type, for example, PDF, Company Download, Image files, etc.

Description/Type – Groups by the description added to the document as reference, for example, Application, Renewal, Declaration Page, Receipt.

Category – Categories are set by your CMS Administrator. Documents can be assigned to a category when attached to the client file, or by editing the attachment properties from the Attachments screen.

For example, a scanned photograph depicting vehicle damage can be attached to the client file and assigned to a Photo category. This enables you to group by document categories.

See Attachment Properties for details.

User – Groups attachments according to the CMS user who attached the document to the client file.

Documents for Review – Groups attachments based on whether the attachment is currently in another user's Documents for Review queue.

Date Attached – Groups attachments based on the date the document was attached to the client file. Options include Today, Yesterday, Last month, and other set time periods.

Effective Date – Groups attachments according to the effective date of the item being attached, where applicable.

Group Expand/Collapse – Specifies whether the initial display on the attachment screen is expanded to display all items, or collapsed to display the group headings only.

Sort Column – Specifies which column information to sort by when the list initially loads.

Sort Order – Specifies chronological, or other, listing order for column data when attachment list is initially loaded. Only available when Sort Column is set to something other than Remember Last Used.

For example, if **Sort Column - Date Attached** is selected, options include:

- Oldest to Newest
- Newest to Oldest

File Menu and Quick Launch

Recent Client List Count – Setting determines the number of most recently viewed client files that display on the Quick Launch panel.

Web Browser/HawkLink

Use the **Browser** drop-down list to select the browser you want to use for launching any website, including carrier websites:

HawkSoft's HawkLink browsers enable you to take advantage of mapping capabilities.

See HawkLink Overview to learn more about the different HawkLink options.

> Agency administrators can override which browser opens for a specific carrier using the Website drop-down in Policy/Company Setup. See Policy/Company Setup: Company Website for more information.

HawkLink options

The following options enable you to use HawkLink to launch a website:

- **HawkLink for Google Chrome** – This option uses Google Chrome with a HawkLink extension enabled. HawkLink for Google Chrome adds an easy-to-use mapping tool as a pop-out extension inside of Chrome, and is compatible with more website fields than other versions of HawkLink.

  See HawkLink for Google Chrome for more information.

- **HawkLink Browser (IE BETA)** – This option enables the standalone HawkLink Browser, using the Internet Explorer engine.

  > The HawkLink Browser is a legacy version of HawkLink that is no longer in development. HawkSoft recommends using the newer HawkLink for Google Chrome.

- **HawkLink Browser (Chromium BETA)** – This option is nearly identical to the HawkLink Browser (IE BETA) option, but it uses the

Chromium engine, the same engine that powers Google Chrome.

It is a fully functioning browser, allowing you to navigate to any location on the web, set favorites, and easily update client file information on a carrier website.

> The HawkLink Browser is a legacy version of HawkLink that is no longer in development. HawkSoft recommends using the newer HawkLink for Google Chrome.

See HawkLink Browser (BETA) for more information.

- **Internet Explorer® w/HawkLink Toolbar** – This is the HawkLink toolbar that has been available in all versions prior to 3.10. The HawkLink toolbar is installed as an add-on to Internet Explorer.

> The HawkLink Toolbar is a legacy version of HawkLink that is no longer in development. HawkSoft recommends using the newer HawkLink for Google Chrome.

See HawkLink Toolbar for more information.

Once you have selected your HawkLink preference, you can click the 

button on the main CMS toolbar to open a web browser.

Web browser options:

You can choose to launch websites through HawkSoft using a default web browser of your choice, however, you will *not* be able to access HawkLink features:

- **Google Chrome®** – This option uses Google Chrome, if the browser is accessible on your computer or device. If this option is selected but Chrome cannot launch, a warning displays and the Windows Default Browser is used.

- **Microsoft Edge®** – This option uses Microsoft Edge, if the browser is accessible on your computer or device. If this option is selected but Edge cannot launch, a warning displays and the Windows Default Browser is used.
- **Windows Default Browser** – This option uses the default web browser assigned in your Windows Settings.

> Your selected browser is used when interfacing with carrier websites. Company preferred website browsers can be configured in Policy/Company Setup: Company Website.

Reset All

Returns the user's preferences back to the default setting provided by HawkSoft CMS.

Related Topics

HawkLink Overview
Attachment Properties
Setting User Permissions
Tour of the Client File
Tour of the CMS Start Page
User Setup Overview

User Contact Information

The Information screen in the User Profile dialog is where a user's address, contact phone numbers, work email address, and notes are stored in HawkSoft CMS.

Information entered here can also be used to merge into form letter, email, proposal, and text messaging templates.

Entering or editing user contact information is a task typically performed by an Owner/Administrator.

> Required Permissions:
> In order to set up or modify Contact Information for a new or existing user,

permissions must include:

Setup > User List

No special user permissions are required to make changes to contact information in your own profile.

See Setting User Permissions for more information.

Entering or editing user contact information

1. Click the **Settings** icon, and then select **User List** from the main CMS menu bar.

   The **HawkSoft User List** dialog opens.

   If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. Select a user, and then click **Edit**.

   The **User Profile** dialog for that user opens.

3. Click the **Information** side-tab.

4. Enter or edit the address, phone number(s), email address, and notes for this user.

   The email address cannot be left blank. When the user sends an email from within CMS, the program uses this email address for the return address.

5. Continue to the next tab for this user profile, as needed.

   OR

   Click **Finish** to exit the User Profile dialog.

   For users without User List permissions, this step closes the User Profile dialog.

6. Optional: Click **Apply** to save changes, and then add or edit additional user profiles.

7. Click **OK** to exit the HawkSoft User List dialog.

User contact information is added to the user's profile. All information on this screen is available as merge field data for various forms of correspondence.

The contact information for this user is updated.

> Some agencies choose to enter a user's job title in the **Notes** field so they can merge the job title into correspondence along with the user's name and other information.
>
> For example:
>
> **Abraham Lincoln**
>
> **Agency Principal**

Related Topics

Setting User Permissions
User Setup Overview
User Templates

User Signature Setup

The HawkSoft CMS Electronic Agent Signature enables you to “sign” form letters, proposals, memos, Change Request forms, and most ACORD forms with the click of your mouse.

This article provides instructions for scanning and importing your signature into CMS so that it will be available to add to your correspondence and ACORD forms.

> The signature is saved in an encrypted file so it cannot be used or edited by other programs or users. For this reason, each user requiring a signature must log into CMS individually and insert his or her own signature

> Required Permissions:
> No specific CMS user permissions are required to add your signature. In order to use your signature, or the signature of another user, you must first authorize it. See User Signature Setup, below.

In this topic:

Print and Scan Signature Instructions	Import a Signature	Select and Authorize a Signature

Print the Signature Instruction Page and scan your signature

The Signature Instruction Page provides spaces for you to sign your name, so you can scan your signature into your computer.

1. Click the **Settings** icon, and then select **User List**.

   The **HawkSoft User List** dialog opens with your name selected.

   > If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. Click **Edit**.
3. Click the **Agent Signature** side-tab, and then click **Import New**.

   The **Select Signature Wizard** opens.

4. Click **Next**.

   The **Import Type** dialog opens.

   Acquire Signature from Scanner and **Print signature instructions** are selected by default.

5. Click **Next**.

   The **Print Instructions** dialog opens with your default printer selected.

6. Optional: Select a different **Printer** from the available drop-down.
7. Click **Next**.

   The **Signature Instruction Page** prints and the **Scan Signature** dialog opens.

8. Leave the **Scan Signature**dialog open while you prepare your signature.

   You will come back to this screen once you are ready to scan.

9. Sign your name in each of the eight boxes on the printed **Signature Instruction Page**.

   > Use different types of pens to increase the probability of getting a legible signature after scanning.
   >
   > Avoid touching the black lines with your signature. This will help when cropping the signature and setting the base line.

10. Place the **Signature Instruction** page in your scanner.

11. Make sure your scanner is selected in the available drop-down.

12. Click **Next** on the **Scan Signature** dialog.

13. Follow instructions for your specific scanner.

    > For best results, we recommend that you set your scanner to use 200 dpi in grayscale, and set the output of your scanner to TIF or JPG, not PDF.

    See User Signature Setup below.

Import a signature from your computer

If you have a signature saved on your computer, you can simply import the signature into CMS.

> If your signature is in a PDF format, do one of the following:
>
> - Change the scan output setting to TIF or JPG, and then re-scan
> - Use a snipping/capture tool, and then save the file as a JPEG or JPG file

1. Click the Settings icon, and then select **User List**.

   The **HawkSoft User List** dialog opens with your name selected.

   > If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. The **HawkSoft User List** dialog opens with your name selected.
3. Click **Edit**.
4. Click the **Signature** side-tab, and then click **Import New**.

   The **Select Signature Wizard** opens.

5. Click **Next**.

   The **Import Type** dialog opens.

6. Select **Import Signature**, and then **Browse** to your signature file.
7. Optional: Select **Delete file after import is complete**.
8. Click **Next** to modify and select the signature.

   See User Signature Setup below.

Select and authorize your signature

Once you have scanned or imported your signature into CMS, you should be on the **Select Signature** dialog, review your signatures and choose the best signature to add to your profile.

1. On the Select Signature dialog, click the **Zoom** button, and then click on the **Signature** page in the view window.

   The image view zooms in to 100%.

2. Use the scroll bars on the bottom and right side of the image to view all the signatures.
3. Click the **Crop** button.
4. Click and drag your mouse across the best signature to crop it.

- Get as close to the signature as you can .
- If your first attempt leaves too much white space, keep cropping to get closer to your signature.
- If you make a mistake, click **Reset** to start again.

5. Click **Next**.

   The **Base Line** dialog opens.

6. Click and drag the slider on the left side of the dialog to set the base line.

   The base line determines how your signature sits on the signature line, so that letters that drop below the line, like g's and y's, are placed properly.

7. Click **Finish**.

   A list of users appears in the **Authorization** section of the Signature screen.

8. Select your user name as well as any other users who needs permission to select your signature when completing a form letter, proposal, or ACORD form.

   When another user inserts your signature, that user's initials display next to your signature on ACORD forms, but will not display next to your signature on form letters or proposals.

9. Click **Finish** to exit the User Profile dialog box.

   For users without User List permissions, this step closes the User Profile dialog.

10. Optional: Click **Apply** to save changes, and then add or edit additional user profiles.
11. Click **OK** to exit the HawkSoft User List dialog.

Your signature is imported into CMS and is now available for you and other authorized users to add to ACORD forms and correspondence.

See Creating and Modifying an ACORD Form and Modifying Correspondence Templates (Letters, Memos, Proposals, and Policy Overview) for more information.

Related Topics

Certificate of Liability Insurance Overview
Form Letter Templates
Proposal Templates
Setting User Permissions
User Setup Overview

Calendar Integration

Calendar integration with HawkSoft CMS makes it possible for you to sync with Outlook or selected online calendars to view, edit, and create events from the Calendar side panel on the HawkSoft CMS Start Page.

- Multiple calendars with the same provider can be configured with CMS.

  For example, if you have more than one calendar set up under your Google account, one for customer birthdays and one for annual review appointments, they can be combined in the CMS calendar view.

  Calendars from multiple providers cannot be combined. For example, you cannot configure both your Google and Outlook calendars together in CMS.

- When integrating with a Microsoft Outlook® calendar, CMS will have access to the calendars for the user logged onto Windows® only.
- Calendar events are displayed on the Calendar panel for all of your calendars configured with your provider.
- CMS automatically displays up to 25 calendar events for two different days. Those two days must be within five days of each other, starting with the current day.

In this topic:

Software Requirements	To Set Up or Modify Calendar Integration	To Use the Calendar on the CMS Start Page Calendar Panel

Required Permissions:
In order to configure Calendar Integration for another user during User Setup, permissions must include:

Setup > User List

No special user permissions are required to complete calendar integration in your own profile or from the CMS Start Page.

See Setting User Permissions for more information.

Software requirements

Calendar integration can be configured with Google™, Microsoft® Office 365, Outlook.com, Hotmail, Live.com, and MSN.

HawkSoft CMS supports integration with Microsoft Office 2007, 2010, and 2013 “Professional” or “Home & Business”.

Microsoft Office Home, Office Home Premium, Office Home and Student, and Trial editions are NOT supported; Microsoft Office must be purchased separately. See System Requirements for more information.

To set up or modify calendar integration

Your calendar(s) can be configured on the Calendar screen, accessed directly from the CMS Start Page or from the User Profile dialog.

From the CMS Start Page

Click **Configure** below the calendar in the right-hand panel.

OR

From the User Profile

1. Click the **Settings** icon, and then select **User List**.

   The **HawkSoft User List** dialog opens.

   > If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. Select a user, and then click **Edit**.

   The **HawkSoft User Profile** dialog for that user opens.

3. Click the **Calendar** side-tab.

Calendar Integration

1. Select your **Calendar Type** from the available drop-down list.
2. Click **Connect**.

   For calendar types other than Outlook, the calendar provider **Login** screen opens if you are not already logged in.

3. Enter your login information, if needed.

   For calendar types other than Outlook, a screen will appear requiring you to give HawkSoft CMS permission to display your calendar events.

   Click **Allow** or **Yes** to grant permission.

   All of your available calendars, for the selected Calendar Type, appear in the Calendar list.

4. Determine how often you want your calendar to refresh on the Start Page by selecting the number of minutes from the **Refresh Interval** drop-down.

5. If you have added a new calendar since your last configuration, click the **Refresh Calendars** button for the new calendar to be available from the list.
6. Use the available check boxes to select the calendar(s) you want to configure with CMS.

   You can select multiple calendars.
7. Save your configuration.
   - From the **Start Page**

     Click **OK** to save your configuration, if accessed from the Start Page.
   - From the **User Profile**
     a. Optional: Click **Next** to save and continue User Setup.
     b. Click **Finish** to save and exit the User Profile dialog box.
     c. Optional: Click **Apply** to save changes, and then add or edit additional user profiles.
     d. Click **OK** to close the User List dialog box.

To use the calendar on the CMS Start Page Calendar panel

The HawkSoft CMS Start Page calendar panel displays a view of the current month, and the Calendar Events section displays scheduled appointments for two days (within a five day window, starting with the current date).

- To add an appointment from the Calendar Panel:
  a. Click the date for the appointment on the calendar.
  b. The calendar launches with the selected date open. Add or view appointment details.

For Outlook, If you don't see your calendar viewer, click your Outlook icon in your taskbar to open the viewer.

- To view or make changes to an existing event displayed on your Calendar Panel, click on the event to launch your calendar and display the event details.

Related Topics

User Setup Overview

User Email Setup

The HawkSoft CMS email feature enables you to send an email from within a client file in CMS. Using CMS to send an email creates log note documentation and attaches a copy of the email to both the log note and the Attachments list of the client or policy.

See Email for more information about using the Email feature.

This article provides instructions for configuring CMS to send emails through your email provider.

This setup is typically completed by an Owner/Administrator.

Required Permissions:
In order to set up or modify Contact Information for a new or existing user, permissions must include:

Setup > Email/Text Messaging/E-Signature > User List

In order to complete this configuration in your own profile, the only permission required is Setup > Email/Text Messaging.

See Setting User Permissions for more information.

Configuring email settings in a user profile

1. Click the **Settings** icon, and then select **User List**.

   The **HawkSoft User List** dialog opens.

If you are editing your own profile, and do not have User List permissions, CMS immediately opens your user profile. Skip to step 3.

2. Select the user name, and then click **Edit**.

   The **User Profile** for the selected user opens.

3. Click the **Information** side-tab.

4. Optional: Enter or modify the user's work email address in the **Email** field.

   If an email address is not entered here, email sent by this user will use the agency email address found in Agency Information as the Return or From email address.

5. Select the **Email** side-tab.

6. Select one of the following to set up **Email Integration**:

   SMTP - CMS sends email directly to the outbound email SMTP server, and then the SMTP server sends the email to the recipient. Contact your email service provider to obtain the correct SMTP settings or search the Internet for current settings.

   Conduct an Internet search for "*[your webmail provider] SMTP settings*" to learn more about Server, Port, and SSL requirements for your provider. Port 465 no longer works. If your provider suggests 465, try entering 587 for the Port.

   SMTP Settings:

   a. Enter the **Server** address.

   b. Enter the **Port** number.

   c. Check **Use encrypted connection (TLS/SSL)** if used by your email service provider.

   d. Enter the email **User Name** and **Password** if the SMTP server requires authentication.

      The User Name is usually the same as the email address.

> For Yahoo users, be sure the email address entered on the **Information** tab in your User Profile matches the User Name.
>
> For Gmail/G-Suite users, an app password with Two-step Verification is required to send SMTP email through your Gmail account. See Google Account Help for instructions.

MAPI - CMS communicates with Windows MAPI and sends the email through a MAPI email client (Thunderbird, for example). The email program then sends the email to the recipient.

> Email sent through MAPI does not support HTML formatting. See Email Templates for more information.

Microsoft Outlook - CMS communicates with Microsoft Outlook, and then Microsoft Outlook sends the email to the recipient.

> HawkSoft CMS supports integration with Microsoft Office 2010, 2013, and 2016 “Professional” or “Home & Business”.
>
> Microsoft Office Home, Office Home Premium, Office Home and Student, Trial editions, and 64-bit Outlook are NOT supported. Microsoft Office must be purchased separately. See System Requirements for more information.

Microsoft Office 365 - CMS sends the email to your Microsoft Office 365 email account, and then Microsoft sends the email to the recipient.

> This requires an Office 365 email account, but does not require Outlook to be installed.

a. Click **Connect**

   A **Sign in to your account** window appears.

b. Select your Microsoft Account from the available options.

   OR

   Click **Use another account** and enter your email address and password, as directed.

c. If Microsoft asks you to confirm your account, follow the steps provided in the dialog.

   The next screen lists the permissions that HawkSoft requires to integrate with Office 365.

d. Click **Accept** to give HawkSoft the necessary permissions.

   A confirmation message appears informing you that HawkSoft is now connected to your Office 365 account.

7. Optional: Click **Test Now** to test the configuration.

   Follow on-screen prompts to send the test email. Assuming your setup is correct, you will receive a confirmation email from HawkSoft, Inc. If you do not, consult with your network administrator or call HawkSoft Support.

8. Continue to the next tab for this user profile, as needed

   OR

   Click **Finish** to exit the User Profile dialog box.

   > If an email address is not entered here, email sent by this user will use the agency email address found in Agency Information as the Return or From email address.
   >
   > For users without User List permissions, this step closes the User Profile dialog, and user email setup is complete.

9. Optional: Click **Apply** to save changes, and then add or edit additional user profiles.

10. Click **OK** to close the User List dialog box.

Completing email setup enables the user to send email from within a client file, and automatically document the content of the email in the selected file.

Related Topics

Batch Emails
Email
Email Templates
User Setup Overview

Batch Email Setup [+Video]

Batch emailing can be set up for specific users. Once set up, HawkSoft CMS enables mass emailing to customers and prospects in conjunction with Report Generator.

See Batch Emails for more information on how to use the CMS Batch Email feature.

This article provides instructions on how to configure Batch Email in your own profile and/or for other users.

> Batch emailing is done at the agency's own risk.
>
> - HawkSoft, Inc. is not liable for actions taken by an ISP, a mail hosting service, or other email filtering services.
> - It is the agency's responsibility to know and understand their ISP or mail host provider's rules regarding email.
> - Certain state and federal laws may apply to your batch emails, depending on the type of emails being sent. Violating these laws may result in legal action being taken against the agency. It is the agency's responsibility to know and follow the laws of their jurisdiction regarding mass emails.
> - Violation of your mail provider's rules could result in black-listing, closing of your email account(s) or flagging your email account as a source of spam.
> - Configuring the HawkSoft CMS batch email service to comply with your ISP or mail host service rules, and creating email templates that are spam filter friendly, are the responsibility of the agency.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Email/Text Messaging/E-Signature
Reports > Batch Email
(Note: You can complete Batch Email Setup in another user's profile with the **Setup > User List** permission.)

See Setting User Permissions for more information.

To set up Batch Emailing

If your agency administrator has granted you the Batch Email permission in CMS, you can follow these steps to set up Batch Email on your own user profile. Otherwise, an agency administrator can follow these steps to set up Batch Email for another user.

1. Contact your email service provider regarding the maximum number of emails that can be sent per minute without triggering a spam alert.

   If your agency does not have a Microsoft Office 365 subscription, or does not want to send Batch Emails through an Office 365 email, you will need to integrate with your email account through SMTP. Ask your email service provider for the following information:

   - The outgoing SMTP server address
   - The port number
   - Determine if the email provider requires an encrypted connection (SSL or TLS)
   - Determine if the SMTP server requires authentication and, if so, the user name and password
   -
     - Contact your Internet Service Provider and ask about the maximum number of allowable emails per minute. This threshold may differ from the email provider’s limits.
     - If you exceed the ISP or email provider's limit,

> you run the risk of having your email account black-listed and outgoing emails blocked.
>
> - For agencies that prefer to completely avoid potential issues, contact an email relay service that can provide an SMTP account used specifically for sending batch emails.

2. Click the **Settings** icon, and then select **User List**.

   If you are an agency administrator with full access to the User List, the User List opens. Select the user to set up Batch Email for, and then click **Edit**.

   Otherwise, your User Profile opens.

3. Select the **Batch Email** side-tab.

   > The Batch Email side-tab does not appear in a user's profile unless Batch Email permissions have been granted. See User Permissions for more information.

4. Select the email **Integration Type** from the drop-down.

   - Select **Use Email Settings** from the drop-down if you are already using SMTP or Microsoft Office 365 for regular email integration (i.e. under the Email tab) and you want to use the same email address and settings for Batch Emailing.
   - If you selected **SMTP**, the **Batch Email SMTP Settings** section appears. Check with your agency technician and/or your email provider's support for the correct SMTP settings.

     a. Enter the **Email Address** to be used for Batch Emailing.

     b. Enter your outgoing **SMTP Server** address.

     c. Enter the **Port** number.

     d. Check **Use encrypted connection (TLS/SSL)**, if required by your email provider.

     e. Enter the **User Name** and **Password** for the email account used to send batch emails if the SMTP server requires authentication.

- If you selected **Microsoft Office 365**, click the **Connect** button that appears next to the drop-down. Use the Microsoft Account dialog that appears to log into your Office 365 account and connect the account to HawkSoft.

5. Set the maximum number of emails to be sent per minute.

> This is a required field. You will not be able to send batch emails without entering a number greater than zero. Typically, this is set to the maximum number of emails per minute that can be sent without triggering a spam alert, as provided by your email provider and ISP.

6. Click **Test Now** to send a test email to your email account.
    a. A confirmation dialog box opens, click **OK**.
    b. Assuming no errors, a dialog box opens telling you to check your email inbox. You should see an email from **HawkSoft Email Test** in the inbox of the email address entered. If you see the email, the batch email test was successful.

       If an error occurs, confirm the information entered in the Batch Email setup with your email service provider and network manager. The most common causes of error are the email password or SMTP server information being incorrect.
7. Click **Finish** to save **User Profile** settings.
8. Click **Apply**.
   If you are an agency administrator setting up Batch Emails for other users in your agency, repeat steps 2a-8 for each user authorized to send Batch Emails.
9. Click **OK** to close the HawkSoft User List dialog.

Related Topics

Batch Emails
User Setup Overview

Purchasing HawkSoft Text Messaging

HawkSoft Text Messaging enables you to send text messages to your clients and manage their replies directly from HawkSoft CMS. This feature is available to your agency as an add-on service, and is purchased through the Marketplace.

This guide walks you through the steps to purchase and set up Text Messaging for your agency. Since HawkSoft Text Messaging is a Data Sync feature, you must first enable HawkSoft Data Sync from the Marketplace.

> As an alternative to using the built in HawkSoft Text Messaging feature, your agency can subscribe to an *email-to-text messaging* service provider and send text messages directly from a client file.
>
> See Text Messaging Overview for more information.

In this topic:

Notes on HawkSoft Text Messaging

- **Opt in required**
  Federal law requires your customers to opt-in to receive text messages from your agency. This is mandated by the FCC's Telephone Consumer Protection Act. HawkSoft automates this opt-in process with the click of a button. Learn more.
- **Texting is not for marketing purposes**
  HawkSoft Text Messaging is only for informational texts. You may be in violation of federal and/or state regulations if you use texting for marketing purposes.
- **Your agency receives one text messaging phone number**
  Your agency is assigned one central text message phone number. Even if multiple staff members are texting a client, that client will see text messages arriving from a single phone number.

Before you begin

Before purchasing HawkSoft Text Messaging, you must first register for the HawkSoft Marketplace and enable HawkSoft Data Sync so the application can access your HawkSoft data.

Your email address must be listed on the HawkSoft License Agreement as a main contact.

Register for the HawkSoft Marketplace

The HawkSoft Marketplace offers agency managers the option to enable HawkSoft Data Syncing, purchase and configure HawkSoft products, and integrate with third-party applications.

1. Click the **Settings** icon on the the HawkSoft CMS toolbar, and then select **Marketplace**.
2. Click **Register Now**.
3. Enter your **Email Address**, and then click **Submit**.

   Your email address must be listed on the HawkSoft License Agreement as a main contact. If you receive an error indicating your email address is not listed as a main contact, or your current email address is different than the one used for the HawkSoft License Agreement, please have your agency owner contact billing@hawksoft.com to update your information, and then try again.

   An **Authentication Code** is sent to your email address.
4. Copy the code from the email and paste it into the corresponding field on the Marketplace registration window.
5. Check the box below the Authentication Code field stating you agree to the **Terms and Conditions for HawkSoft Marketplace**.
6. Click **Submit**.

   A confirmation message appears.
7. Close the HawkSoft Marketplace Registration screen.

   You are ready to enable additional HawkSoft products and third-party applications.

Enable HawkSoft Data Sync

You can enable HawkSoft Data Sync to leverage the power of your HawkSoft data and integrate with third-party services as they become available in HawkSoft Marketplace.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration Settings

See Setting User Permissions for more information.

1. Click the **Settings** icon, and then select **Marketplace**.

   If you haven't registered for the Marketplace, see HawkSoft Marketplace for detailed instructions.

2. Click and read the **HawkSoft Terms and Conditions** in the *HawkSoft Data Sync* section, and then check the box to accept the Terms and Conditions.
3. Click **Activate**.

   The **HawkSoft Cloud Confirmation** window opens.

4. Click **Confirm**.

   A confirmation message appears.

5. Click the **Return to Marketplace** button.

Purchase HawkSoft Text Messaging

Once Data Sync is enabled, you can register for Text Messaging through the Marketplace.

1. Click the **Settings** icon, and then select **Marketplace**.
2. Under HawkSoft Text-Messaging, click **Activate**.

   Important HawkSoft Text Messaging Information displays.

3. Review the opt-in requirements, rules regarding use for marketing purposes, information about your phone number, read the terms and conditions, and then click **Next**.
4. Determine if your agency will require users to opt-in before sending messages, allow users to skip the opt-in process, or if HawkSoft's opt-in process will be disabled for your agency.

   Federal regulations require that agencies receive opt-ins from clients before sending text messages. If you choose to disable opt-ins, or allow agents to skip opt-ins, you agree to receive opt-ins from clients through other means.

> HawkSoft is not responsible for any fines or penalties imposed by telecom carriers for non-compliance.

See Text Messaging Opt-In Compliance to learn more.

5. Enter a phone number for clients with questions to call in the **"Help" Response** section.

   When a client sends the phrase 'HELP' to your texting number, an automated message will direct the customer to call this number.

6. Enter an **Area Code** *or* **Zip Code** to generate a localized phone number to be used by your agency for text messaging, and then click **Finish**.

   > In some metropolitan areas, your desired area code may be unavailable. If you receive this error message, use a zip code to generate your phone number.

7. Check "**I understand my agency will be charged $20.00 per month starting on my next HawkSoft invoice.**"

8. Read the **Additional Required Information**.

   This section explains that additional information will be required on the next page in order to register your agency with The Campaign Registry (TCR). Telecom carriers require that all businesses sending text messages register their business with TCR.

9. Click **Finish** to complete your order.

   A **Congratulations** page appears, which shows the status of your HawkSoft texting number and lists the next steps towards enabling HawkSoft Text Messaging.

Complete required information to start registration process

Additional information is required to register your agency with The Campaign Registry (TCR) before HawkSoft Text Messaging can be enabled. Telecom carriers require that all businesses sending text messages register their business, or "brand", with TCR.

If this information is not filled out by the agency, a HawkSoft representative will contact your agency to gather this information.

> If you are interested in using your agency's main phone number as your HawkSoft Texting number, you can request to enroll in Main Number Texting through the Required Information Form. See Purchasing HawkSoft Text Messaging for more information.

1. Open The Campaign Registry Required Information Form in your web browser.
2. Fill out the information requested in the form.
3. Click **Submit Information** to send this information to HawkSoft.

   HawkSoft will use this information to register the agency in The Campaign Registry.
4. Close the Marketplace window and return to HawkSoft CMS.

HawkSoft submits this information to The Campaign Registry. After registration is complete within TCR, HawkSoft will activate Text Messaging for your agency.

HawkSoft will send an email to your agency's main contacts once Text Messaging is activated.

If your agency previously used a different text messaging integration (such as Bulk SMS or Message Media), HawkSoft Text Messaging will be automatically set as the default texting tool within all User Settings after activation. If the additional text messaging service is no longer needed, you may cancel the service.

> Once your agency receives notification that HawkSoft Text Messaging is activated, all users must restart CMS in order to begin using HawkSoft text messaging.

Your texting number

Once you complete your HawkSoft Text Messaging order, HawkSoft begins creating and registering a new texting number from your agency, using the area code provided on the previous page.

It can take up to five minutes for HawkSoft to register your new phone number. You can click the refresh button after waiting, or view your number at a later time by re-opening the Marketplace and clicking **Manage** under HawkSoft Text Messaging.

Main Number Texting

Upon request, HawkSoft can set up your agency's main phone number as your HawkSoft Text Messaging number. There is a $99 one-time fee for enabling Main Number Texting.

> Not all phone numbers are able to be used for Main Number Texting. Your agency will not be charged the one time fee until your requested phone number has been successfully enrolled in Main Number Texting.

HawkSoft Text Messaging setup must be completed before the process for enrolling in Main Number Texting can begin. Your agency will use the separate texting number ordered through the Marketplace until the enrollment is complete.

1. Complete and submit The Campaign Registry Required Information Form in your web browser.

   If your agency already submitted the form but selected not to enroll in Main Number Texting, and you would now like to switch to your agency's main number, contact Product Support for assistance.

   a. Within the Required Information Form, select **Yes** next to "**Do you wish to enroll in Main Number Texting?**"

   b. Complete the additional fields that appear with your main number, your phone service provider, the business name you use with your phone service provider, and the service address you use with your phone service provider.

   Once HawkSoft is notified of intent to enroll, the agency principal will receive an email from HawkSoft staff containing a Letter of Authorization and signing instructions. If your agency did not complete the additional Main Number Texting fields within the TCR Required Information Form, you will be asked to provide additional information.

2. Complete the **Letter of Authorization**.

3. Reply to the email from HawkSoft with the completed Letter of Authorization attached. Provide any additional information needed within your reply, if requested to do so by HawkSoft.

   Upon receipt, HawkSoft informs all agency main contacts that HawkSoft will now attempt to get the requested phone number for Main Number Texting, and will notify the agency when the process is complete.

   You will receive an email from HawkSoft confirming that your agency is now signed up for Main Number Texting, using the number you requested.

   Once Main Number Texting is enabled, all old messages and opt-ins will remain, however your previous HawkSoft Text

> Messaging number will no longer be active, and any texts sent to the old texting number will not be received going forward. Make sure to inform your clients of the changed texting number.

If HawkSoft is unable to get the requested number, HawkSoft will inform the agency's main contacts, and you may request to try a different number.

Text messaging administration

Once HawkSoft Text Messaging is enabled, all users can begin sending outgoing text messages to client files they have access to. Administrators can disable text messaging for certain users within User Permissions.

Available Texting Permissions:

- **Client File > Allow Sending Text Messages**: Grants permission for CMS users to send outgoing texts to clients.
- **Setup > Texting Administration**: Allows users to view all text messages, regardless of client file permissions, via the All Unprocessed Text Menu.

Permissions are not required to *view*text messages, so long as the user has permissions to access the client's file.

See About HawkSoft Text Messaging for more information on HawkSoft Text Messaging workflows.

Related Topics

Processing Text Messages
Text Message Notifications
Text Messaging Opt-In Compliance
Viewing & Sending Text Messages

E-Signature Overview

HawkSoft enables you to easily send documents directly from CMS to your customers for an electronic signature. You can create templates to send with your client/policy attachments, ACORD forms, Change Request forms, as well as additional documents saved to your computer. Your customers can then "sign" the document(s) electronically and return them via the electronic signature application you have configured in CMS.

Providing your customers with the ability to electronically sign documents can help improve the quality of their service experience and speed up the time necessary to get documents signed.

You can purchase HawkSoft E-Signature (Powered by Formstack Sign) as an add on product, or you can use one of the e-Signature providers that HawkSoft integrates with.

HawkSoft E-Signature (Powered by Formstack Sign)

> Formstack Status: PSRs can check for issues/outages with Formstack Sign at https://formstacksign.statuspage.io/

To purchase HawkSoft E-Signature (Powered by Formstack Sign)

HawkSoft E-Signature (Powered by Formstack Sign) is available to your agency as an add on service through Marketplace. Once purchased, you can begin sending documents for an electronic signature without any setup.

To purchase HawkSoft E-Signature and assign licensing to specific users, your email address must be listed on the HawkSoft License Agreement as a main contact. If your agency contact information needs to be updated, please have your agency owner contact billing@hawksoft.com to request a change.

No additional configuration is needed with HawkSoft E-Signature.

See Purchasing HawkSoft E-Signature (Powered by Formstack Sign) for instructions.

HawkSoft E-Signature (Powered by Formstack Sign) Account Settings

Once you have purchased HawkSoft E-Signature (powered by Formstack Sign), you can configure Account settings for yourself and for your agency.

HawkSoft E-Signature Account Settings

Using HawkSoft E-Signature (Powered by Formstack Sign)

HawkSoft E-Signature enables you to quickly prepare and send documents for signature directly from a client's file in HawkSoft CMS. This topic describes many of the E-Signature options and features available.

Using HawkSoft E-Signature (Powered by Formstack Sign)

Additional HawkSoft E-Signature providers

In addition to HawkSoft E-Signature (Powered by Formstack Sign), HawkSoft has direct integration available with the following e-Signature providers:

DocuSign™

Contact: 800-379-9973

Original RightSignature® v3

RightSignature enables integration only with Original RightSignature v3. If you have New RightSignature v4, you can contact your RightSignature representative and request to roll back to v3.

Contact: 855-884-2257

> If HawkSoft doesn't have direct integration with your e-Signature provider, you can easily drag and drop documents from a client/policy into your e-Signature program.

Configuring Docusign or RightSignature

Before the e-Signature feature can be used with another provider, integration must be configured in your User profile.

E-Signature Configuration: DocuSign or RightSignature

Using Docusign or RightSignature

HawkSoft enables you to easily send documents directly from CMS to your customers for an electronic signature. You can create templates to send with your client/policy attachments, ACORD forms, and Change Request forms, as well as additional documents saved to your computer.

Using DocuSign or RightSignature

HawkSoft E-Signature Templates

HawkSoft CMS enables you to create templates for composing standardized e-Signature messages to send to clients with documents to be signed. These templates can be used with any e-Signature provider. You can also attach documents to templates, such as agency, company, or state disclosures or acknowledgments. These documents will be included in your e-Signature package when the template is selected. Templates can be selected, and modified, if needed, when sending documents for electronic signature.

E-Signature Templates

Phone System Integration

HawkSoft enables you to configure your phone system to integrate with CMS. This integration enables you to place outbound calls from within a client file with the click of a mouse, and to open an inbound caller's client file as soon as you receive a call.

Depending on your provider, different configuration options are available. Most providers enable you to configure both outbound dialing and inbound call screen pops with CMS.

If your provider has configured inbound calls, CMS either opens the client file automatically, or displays a dialog with the option to open the client file.

This article explains how to configure CMS to integrate with your phone system.

In this topic:

Before you begin	Incoming Call Integration (ScreenPops)	Outbound Call Integration

Phone integration is only supported on Windows workstations and cannot be configured on Mac devices. Inbound call integration is ***not*** supported on Windows 7.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > General Configuration

See Setting User Permissions for more information.

Before you begin

Before integrating the agency's phone system with HawkSoft, verify that the phone system supports integration.

- For inbound call integration, the phone software must include the ability to launch third-party applications upon receiving a call.
- For outbound call integration, the phone software must support placing calls using the **CallTo** and/or **Tel** protocols within Windows.

Phone Integration Glossary

VoIP
: Voice Over Internet Protocol - This term describes any voice or phone service that operates through the Internet instead of through telephone lines. Most VoIP services run through a computer.

Protocol
: A language that computers use to communicate with each other. On workstations running Windows, the main protocols for communicating with VoIP software are **CallTo** and **Tel**.

Argument
: Information that one program shares with another. For the purposes of this article, arguments include the CMS Username, CMS Password, and caller's phone number.

Program Call
: An action one program takes to launch a separate program. For outbound phone calls, CMS makes a program call to the phone system, and for inbound calls the phone system makes a call to CMS.

Path
: Also known as 'file path' or 'program path'. This is the location of a program, file, or folder on a computer.

%LocalAppData%

This is a variable pre-built into Windows that points to the user's local appdata folder. (C:\Users\ *[User Name]*\AppData\Local).

Incoming Call Integration (ScreenPops)

Incoming call integration is not supported on Windows 7.

Incoming call integration uses a feature called "ScreenPops" to match client files to a caller's phone number. Upon receiving a call, CMS searches all client files for the caller's number. If at least one client contains the caller's number, a ScreenPop opens showing all client files containing that number.

To configure incoming calls, your agency's VoIP software must be configured to launch the ScreenPop application, with arguments for the CMS user's initials, password, and the caller's phone number. The steps to do so vary between VoIP providers, and as such it is recommended to have an agency technician assist with incoming call integration setup.

Local agencies

For locally hosted agencies, the VoIP software should be configured to launch **%localappdata%\hawksoft\cms\program\CmsScreenPop.exe**.

If you have a non-standard HawkSoft installation, such as a terminal server, this path may differ for you. If the above path does not work, have your agency technician point the VoIP software to the **CMSScreenPop.exe** application within the HawkSoft folder in your local AppData or the agency's HawkSoft database.

Incoming Call Arguments

Arguments highlighted in bold are required for ScreenPops to function.

/PHONE:"%P"	Passes the phone number to CMS. **%P** stands for the variable used by the phone system for the caller's phone number. This variable may vary between phone vendors; for example, %P should be replaced with **%E** on RingCentral phones.

/LOGIN:[user initials]	Passes the user's CMS initials to the ScreenPop application. For example, **/LOGIN:CMS**
/PASSWORD:[password]	Passes the user's CMS password to the ScreenPop application. For example, **/PASSWORD:Secret123!**
/LAUNCH (Optional)	If this argument is included, HawkSoft will automatically launch the matching client file. If this argument is *not* included, or if there is more than one matching client file, a ScreenPop appears showing which client files match the caller's number, and gives an option to launch the selected client.
/CFG:[config file path] *(Optional)*	For local agencies in multiple database environments, use this argument to point to the correct configuration path.
/DURATION:[seconds] *(Optional)*	If this argument is included, ScreenPops will only appear for the amount of time set once launched.

List of common phone providers and parameters required

> HawkSoft does not maintain documentation for any of the following phone systems. Please direct phone system questions to the agency technician or phone provider.

Toshiba Call Manager

/PHONE:"%P" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

Xarios Phone Manager

Set objShell = CreateObject ("Wscript.Shell")

ObjShell.Run ("C:\HAW\HawkSoft.Connect.exe" /cfg:C:\haw\hawk.ini /PHONE: " + PhoneControl.CLI + " /LOGIN:"*[initials]*" /PASSWORD:"*[password]*")

ISymphony

/PHONE:"%CID NUMBER%" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

SAMSUNG XCHANGE

/PHONE:"%CALL" \CONTACT\TEL% /LOGIN:*[initials]* PASSWORD:*[password]* /LAUNCH

XChange Integration needs to be set up as a Custom Button.

RINGCENTRAL

/PHONE:"%E" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

AllWorx

/PHONE:"%CALLNUM%" /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

IdentaPop Pro

Supports many Tel Protocol compliant business telephone systems including 3CX, Alcatel, Allworx, Asterisk, Avaya, Cisco, Ericsson, ESI, Freeswitch, NEC, Nitsuko, NBX, Nortel, Panasonic, Phillips, Siemens, Splicecom and Zultys.

This software can pass Caller ID information from these phone systems to an external program such as HawkSoftConnect.exe.

/PHONE:[CID] /LOGIN:*[initials]* /PASSWORD:*[password]* /LAUNCH

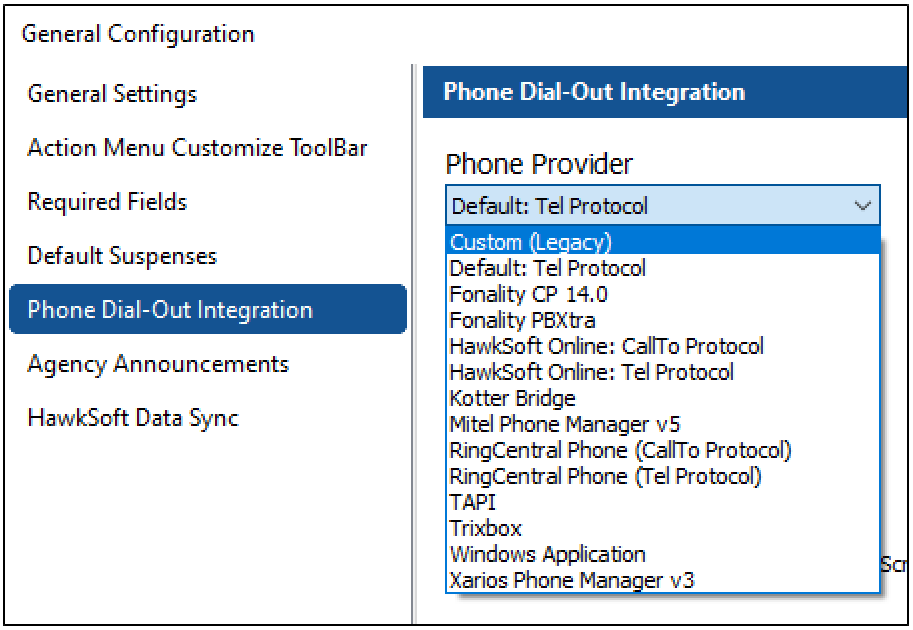
Outbound call integration

HawkSoft enables users to call clients' phone numbers directly from CMS by placing a program call containing the number to call to the user's phone system.

To enable outbound integration within CMS, a default phone provider or protocol needs to be set inside of General Configuration. However, individual users can override the default setting from the User List.

To set the default phone provider or protocol in CMS

1. Open the **Setup** menu.
2. Open **General Configuration**, and then select **Phone Dial-Out Integration**.
3. Select the agency's phone provider or protocol from the **Phone Provider** drop-down.



4. *Optional:* Enter a phone number and click **Call Now** to test the integration.
5. Click **OK** to save changes.

To override a user's phone provider or protocol in CMS

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> **Setup > User List** *(Required to edit a user profile other than your own)*
>
> See Setting User Permissions for more information.

1. Open the **Setup** menu.
2. Open the **User List**.
3. Select the user to edit, and then click **Edit**.
4. Select the **Phone Dial-out Integration** tab.
5. Check **Override Setup > General Configuration Setting**.
6. Select the new provider/protocol from the drop-down.
7. *Optional:* Enter a phone number and click **Call Now** to test the integration.
8. Click **Finish** to save changes.

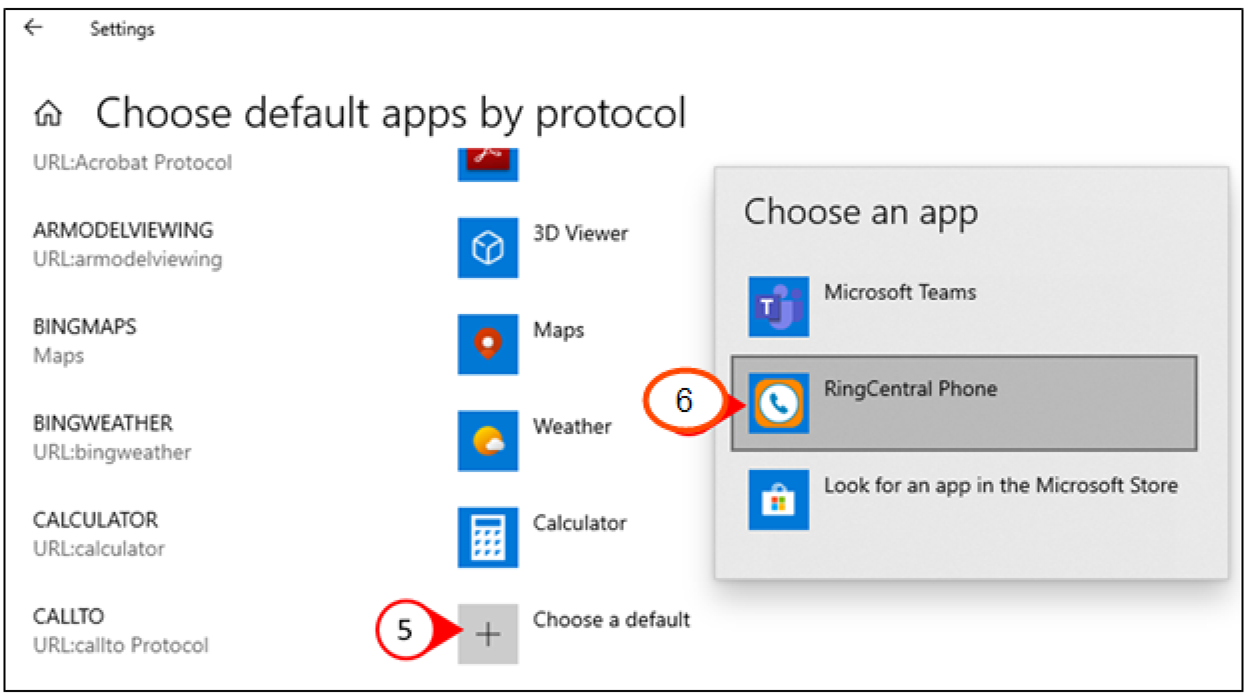
To pair your phone to CallTo or Tel in Windows

For agencies/users with either **CallTo** or **Tel** selected as the phone provider/protocol, the CallTo or Tel protocol must be set to open the phone system within Windows.

1. Open the **Start Menu** on the user's workstation.
2. Search for "**Default apps**".
3. Click "**Choose default apps by protocol**".
4. Locate the **CALLTO** or **TEL** protocol.

> The list of protocols is sorted alphabetically.

5. Click on "**Choose a default**" next to the CALLTO or TEL protocol.
   a. If an app is already selected as the default, click the app icon instead.
6. Click the user's phone application.



Customize HawkSoft CMS

HawkSoft CMS offers a variety of ways to customize your management system to suit your agency's workflows, as well as options for customizing the look of the application.

This article gives an overview of all the options available for customizing HawkSoft CMS.

Agency level

Agency Announcements

HawkSoft CMS enables you to create customized announcements on your Agency's Start Page. You might want to use the Announcement section to display agency news, company goals, and events for your staff.

In addition to text, you can embed images and tables in the Announcement section.

CMS provides a template to help you get started customizing your announcements.

This article provides instructions on activating, customizing, and deactivating Agency Announcements.

Agency Announcements

Agency Logo

HawkSoft CMS enables you to import your agency logo to be included on invoices generated by CMS, ACORD ID cards (other than state specific), correspondence, and on your agency's CMS Start Page.

This article describes how to import your agency logo into CMS, configure the logo to display in CMS, and add to documents.

Agency Logo

Customizing the CMS Toolbar

The main toolbar in HawkSoft CMS contains several buttons which provide shortcuts to perform common transactions in CMS. You can customize the toolbar by adding buttons to provide additional shortcuts for common tasks performed by your agency and you can remove buttons that your agency doesn't use.

This article explains how to customize the toolbar by adding and removing buttons for Action menu related tasks.

See Shortcuts to External Tools [+ Video] to configure button shortcuts to websites or programs (applications), such as a calculator tool or a real estate mapping website, etc.

Customizing the CMS Toolbar

Client Miscellaneous Information

The HawkSoft CMS Client Miscellaneous Information (Client Misc Info) screen displays customized fields you can use to enter data not included in any of the standard fields found in the Edit Client/Policy dialog.

The information in most of these fields can be included in custom reports using Advanced Customized Reports.

The Client Misc Info screen appears blank until the fields are configured. See Setting Up Client Miscellaneous Information Fields for instructions on configuring these fields.

The following article explains how to complete the Client Misc Info dialog after the fields have been set up.

Client Miscellaneous Information

User level

Font Customization

HawkSoft CMS allows you to edit the font type, style, size, and color of certain text categories, such as log text and data text.

This article provides instructions for changing HawkSoft CMS fonts.

> **NOTE**: Font changes are applied only to your computer and will not impact other workstations.

[Font Customization]

Application Theme

HawkSoft CMS includes themes to customize the look of the CMS application.

This article provides instructions for changing your Application Theme, as well as examples of how each theme appears in CMS.

> **NOTE**: Themes are applied only to your computer and will not impact other workstations.

[Application Theme]

Shortcuts to External Tools

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

[Shortcuts to External Tools [+ Video]]

Related Topics

[User Setup Overview]

Font Customization

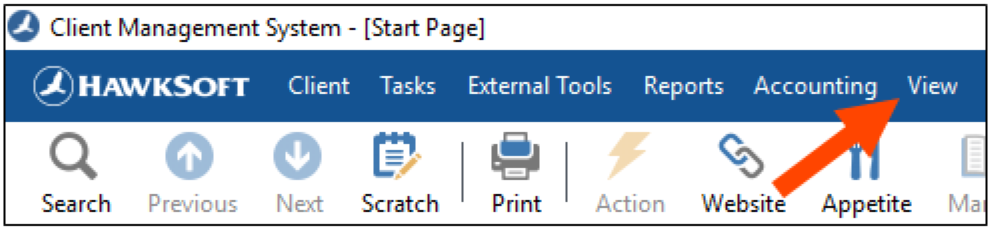
HawkSoft CMS allows you to edit the font type, style, size, and color of certain text categories, such as log text and data text.

This article provides instructions for changing HawkSoft CMS fonts.

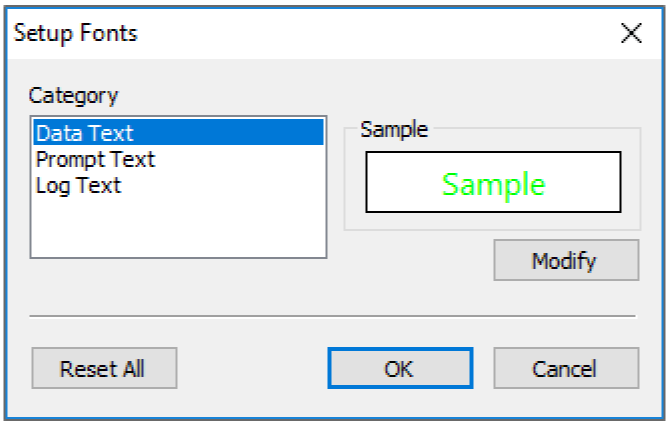
> Font changes are applied only to your computer and will not impact other workstations.

To customize fonts

1. Click **View** from the main CMS menu bar, and then select **Fonts**.



The **Setup Fonts** dialog opens.



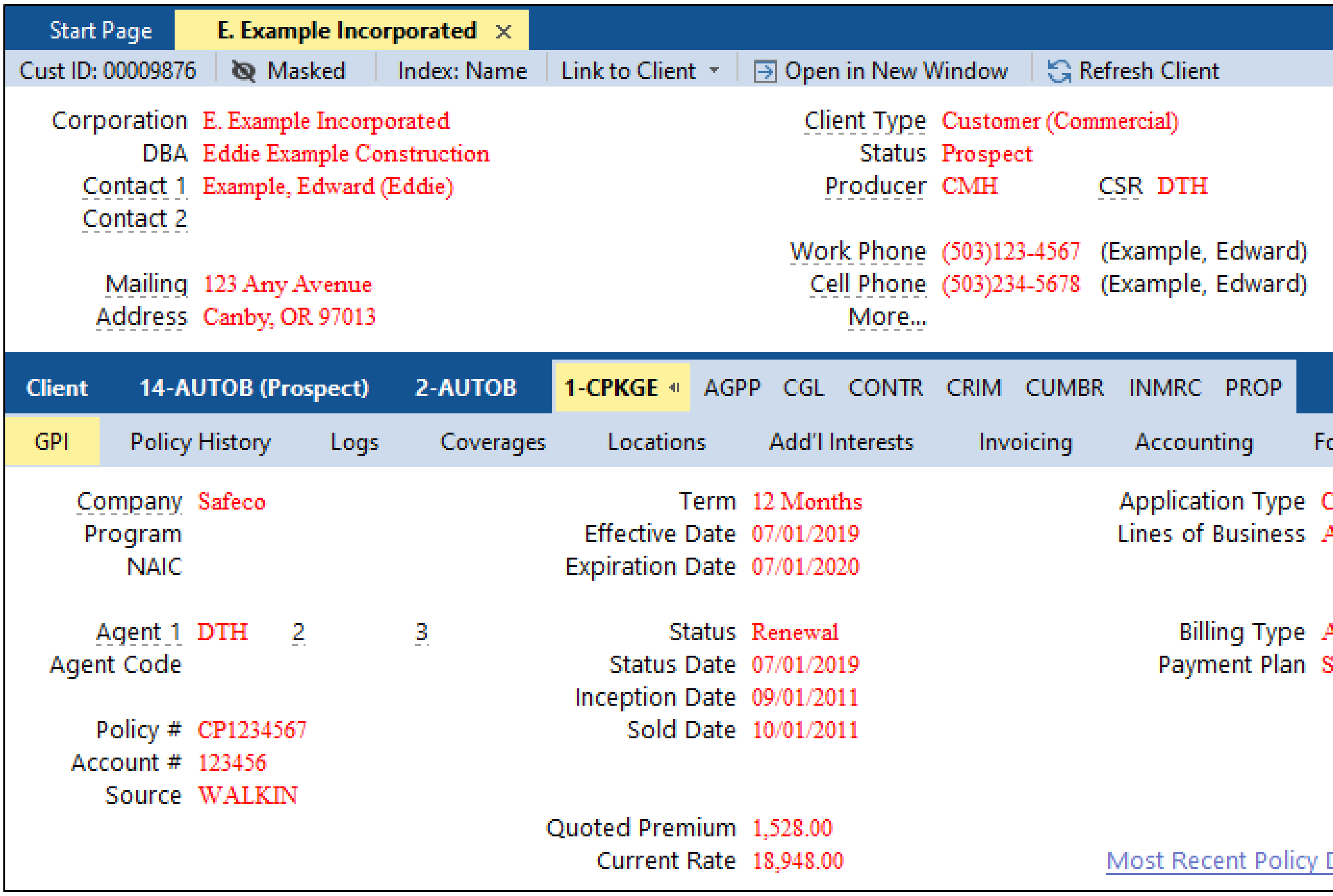
2. Select a **Category**:

Data Text

Changes the font for the client and policy data on the view screens.

Example:

The Data Text has been changed to a red Times New Roman font in the image below.

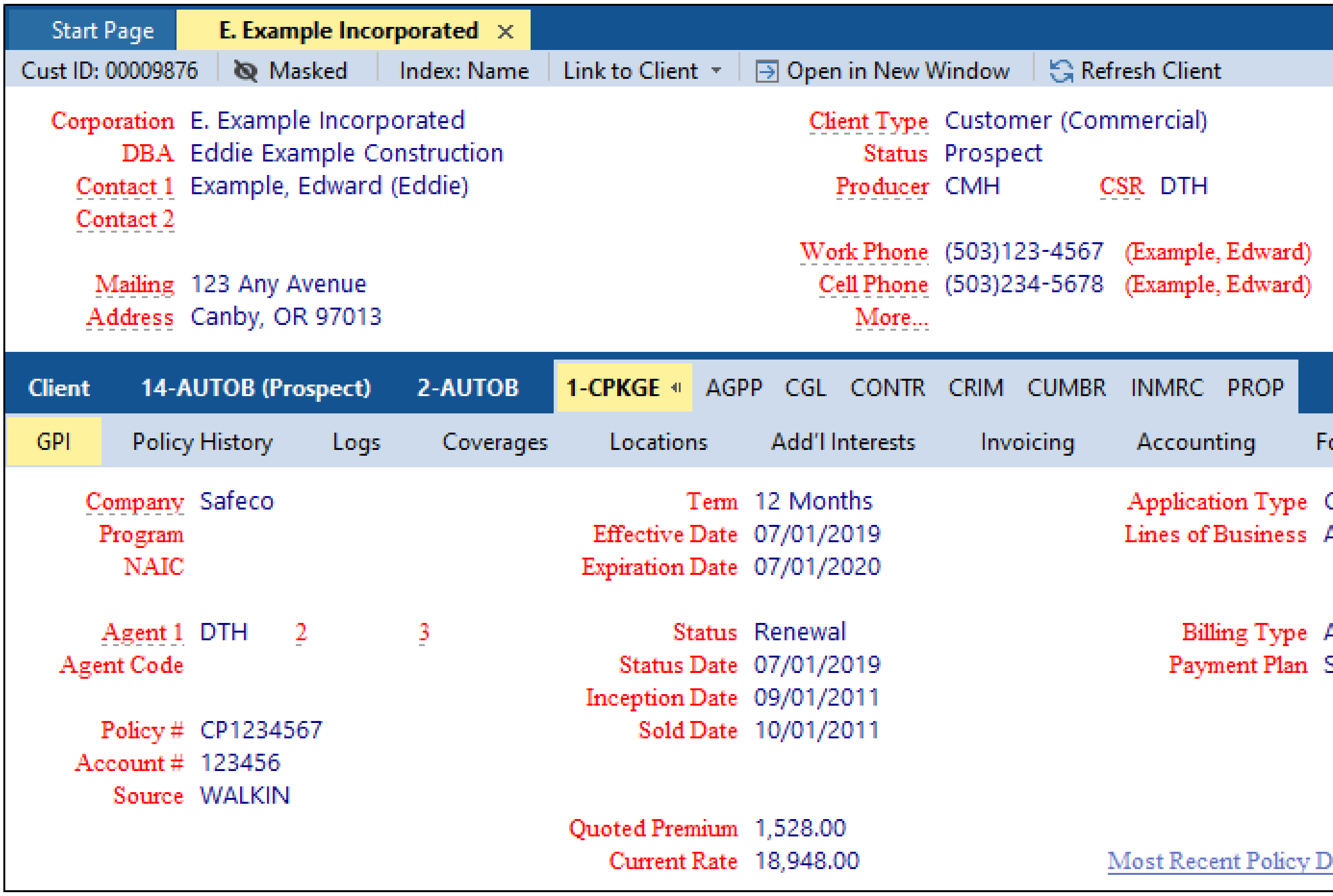


Prompt Text

Changes the font for the Data labels for the client and policy view screens.

Example:

The Prompt Text has been changed to a red Times New Roman font in the picture below.



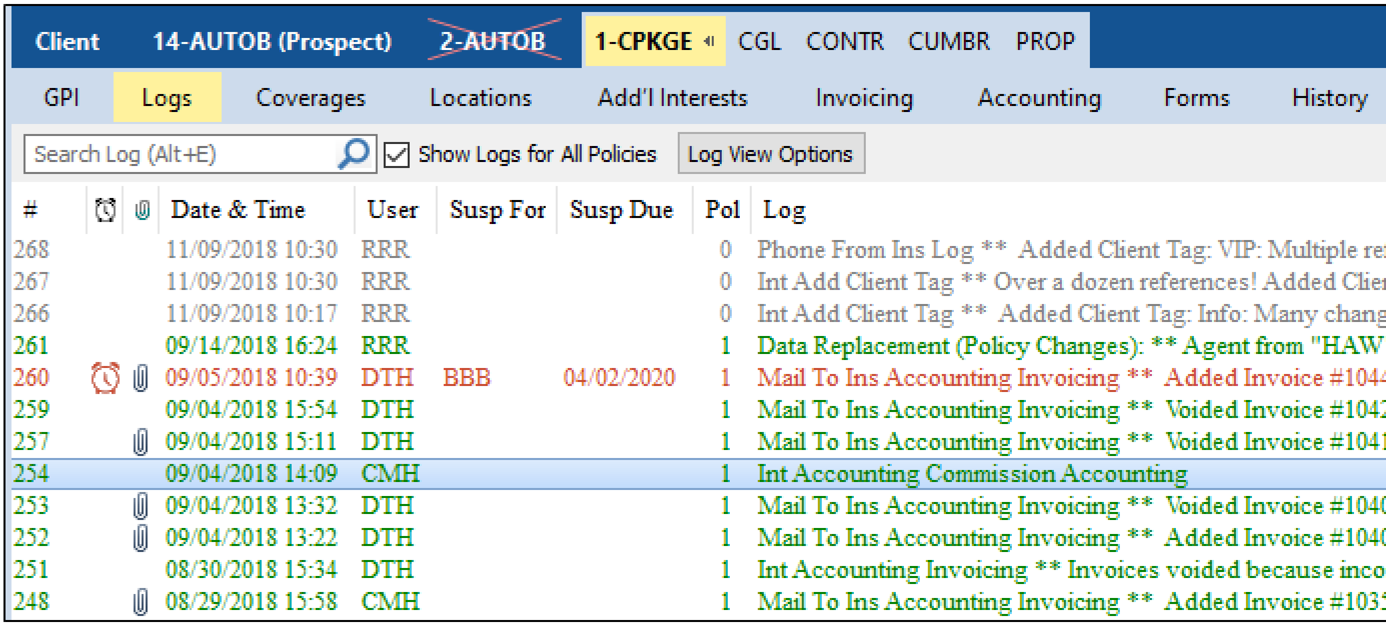
Log Text

Changes the font for the list of log notes in the client/policy.

> Changing the color of this font does not affect the color of the text inside a log note, suspended log notes, or log notes on policies other than the one currently selected.

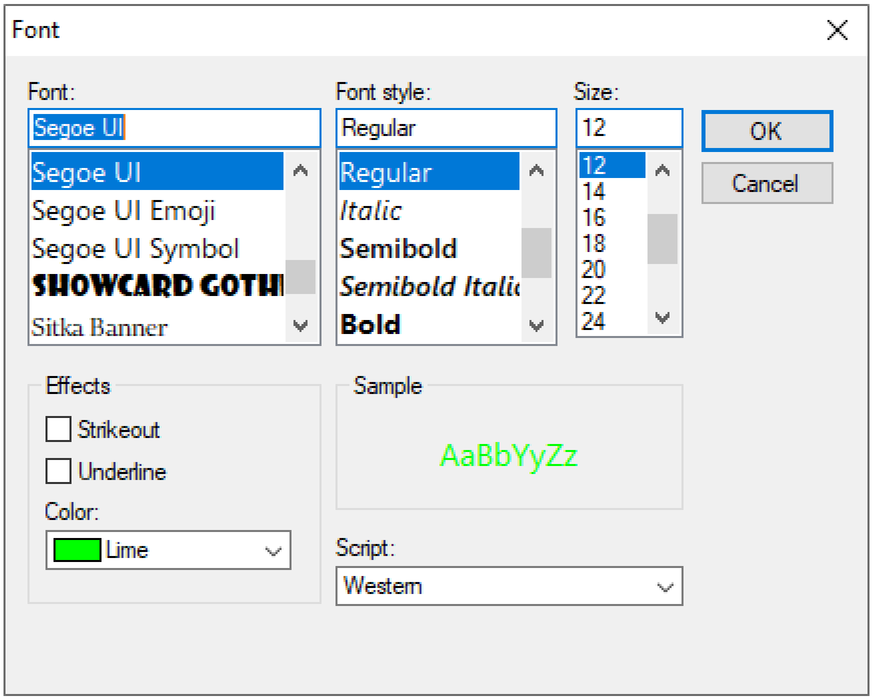
Example:

The Font Text has been changed to a green Times New Roman font in the picture below.



3. Click **Modify**.

   The **Font** dialog opens for you to customize the font for the selected Category.

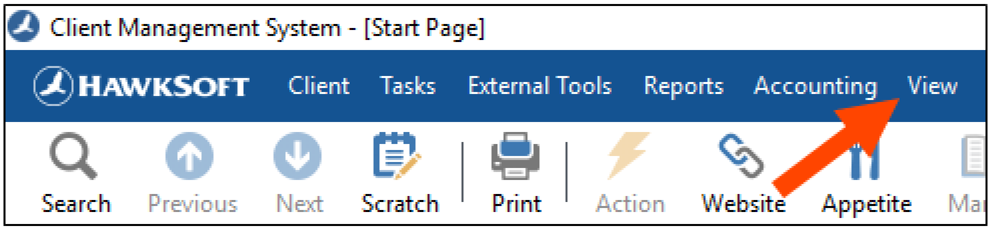


4. Click **OK** to save your changes.
5. Optional: Select another category to modify.
6. Click **OK** to close the **Setup Fonts** dialog.

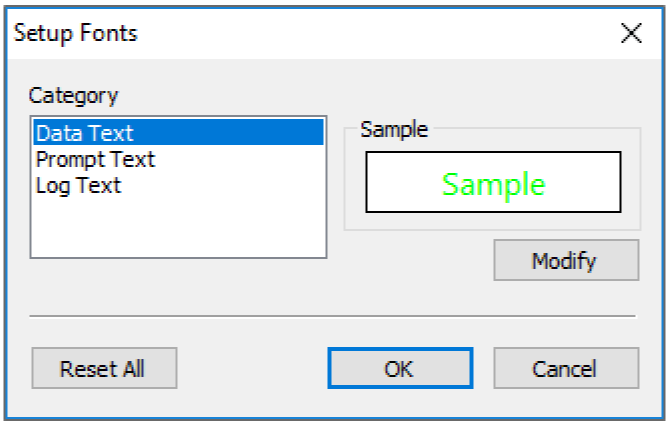
   Your fonts are customized and saved to your profile.

To reset fonts to default settings

1. Click **View** from the main CMS menu bar, and then select **Fonts**.



The **Setup Fonts** dialog opens.



2. Click **Reset All**.
3. Click **OK**.

All fonts have been reset to the default settings.

Related Topics

User Preferences
User Setup Overview

Application Theme

HawkSoft CMS includes themes to customize the look of the CMS application.

This article provides instructions for changing your Application Theme, as well as examples of how each theme appears in CMS.

In this topic:

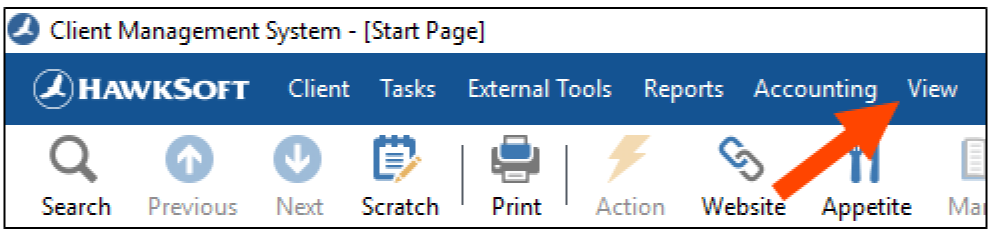
Change Your Application Theme	Examples of Themes

Themes are applied only to your computer and will not impact other users.

Required Permissions:
To perform this task, no specific CMS user permissions are required.

To change your Application Theme

1. Click **View** from the main CMS menu bar, and then select **Application Theme**.



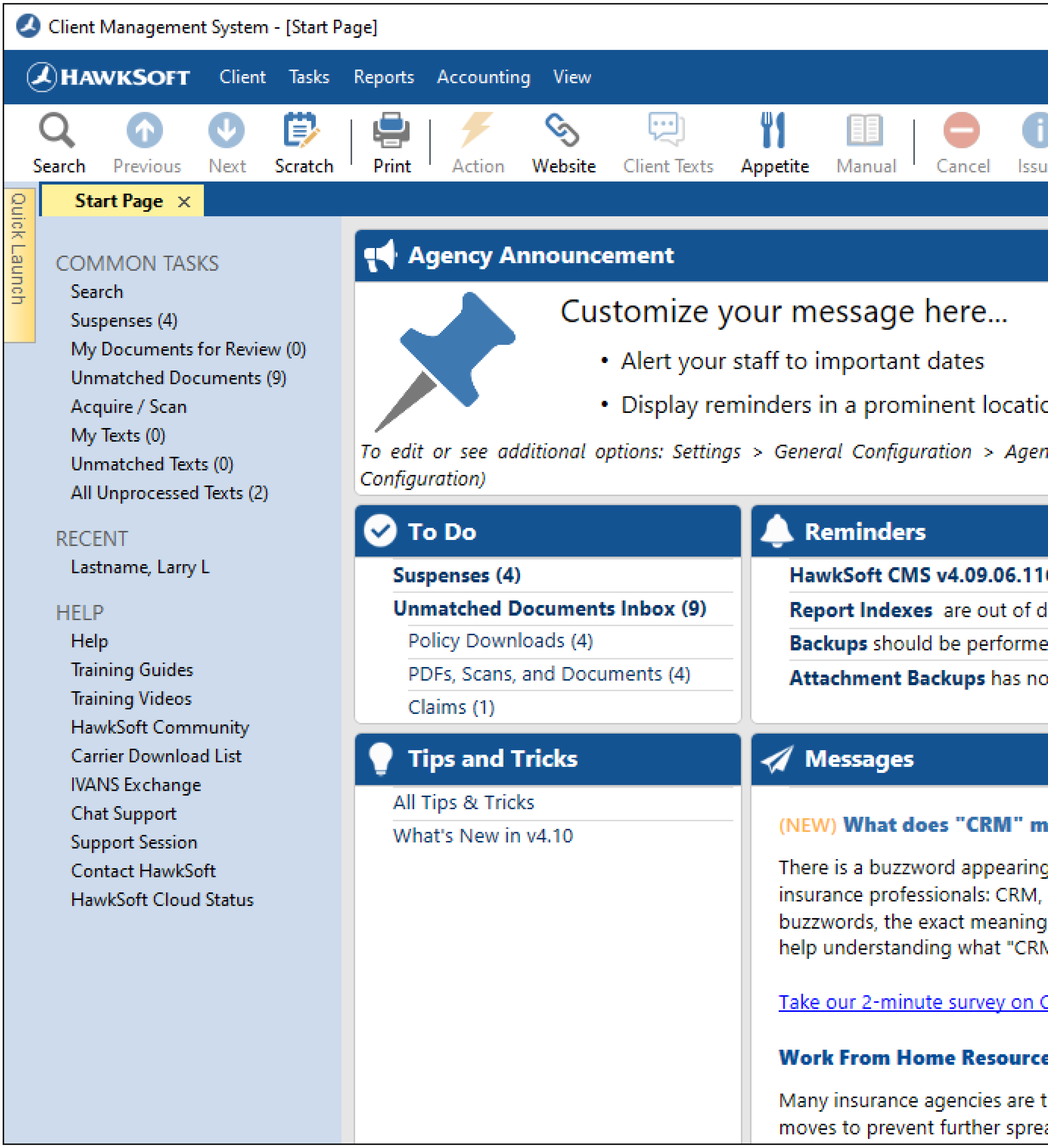
The list of available themes appears.

2. Select the **Light Blue**, **Dark Blue**, or **Dark** theme.

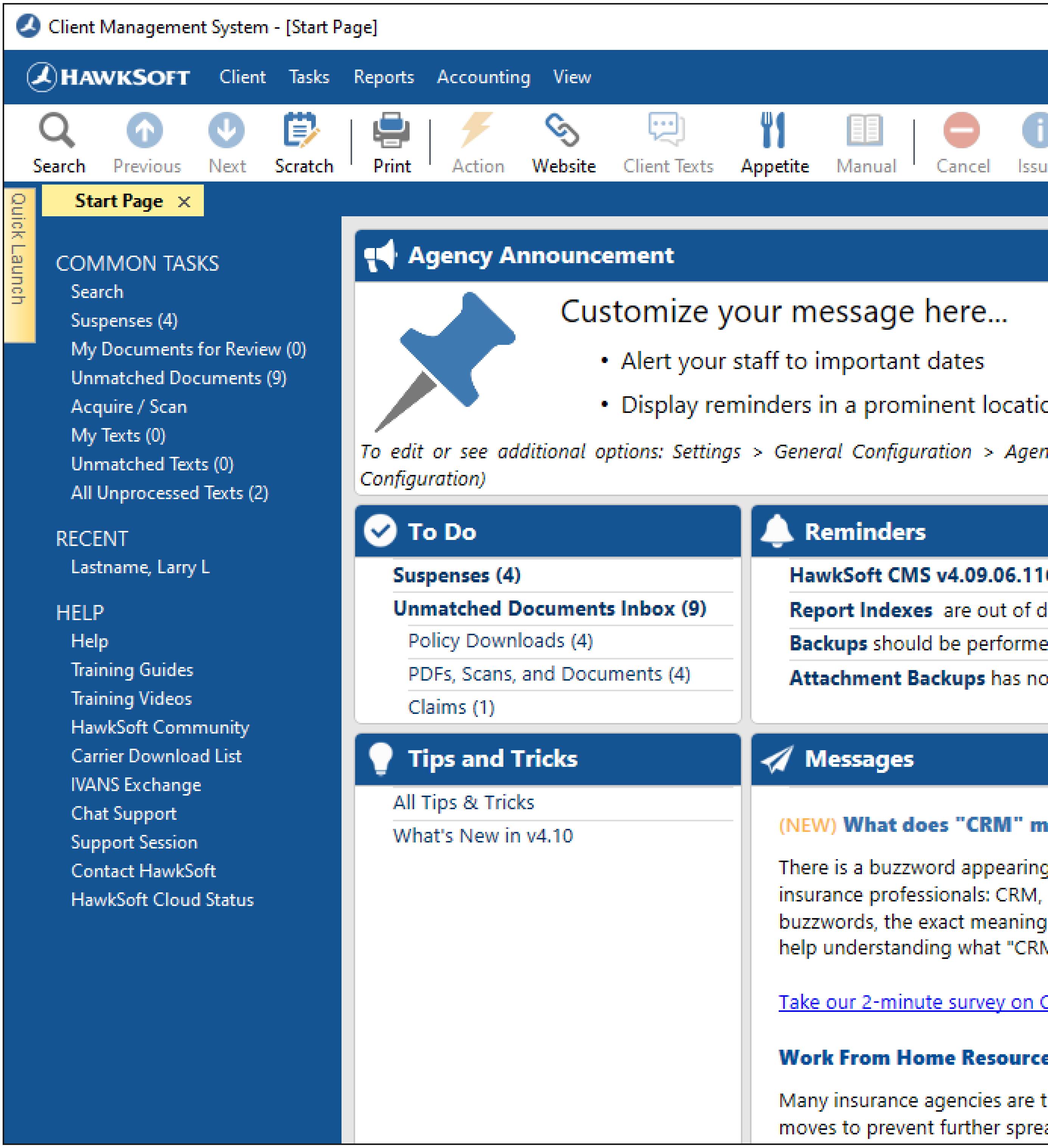
The selected theme applies to all CMS windows on your workstation.

Examples of themes

Light Blue (Default)


Client Management System - [Start Page]
HAWKSOFT
Client
Tasks
Reports
Accounting
View
Search
Previous
Next
Scratch
Print
Action
Website
Client Texts
Appetite
Manual
Cancel
Start Page
Quick Launch
COMMON TASKS
Search
Suspenses (4)
My Documents for Review (0)
Unmatched Documents (9)
Acquire / Scan
My Texts (0)
Unmatched Texts (0)
All Unprocessed Texts (2)
RECENT
Lastname, Larry L
HELP
Help
Training Guides
Training Videos
HawkSoft Community
Carrier Download List
IVANS Exchange
Chat Support
Support Session
Contact HawkSoft
HawkSoft Cloud Status
Agency Announcement
Customize your message here...
• Alert your staff to important dates
To do edit or see additional options: Settings > General Configuration >
Configuration)
To Do
Suspenses (4)
Unmatched Documents Inbox (9)
Policy Downloads (4)
PDFs, Scans, and Documents (4)
Claims (1)
Reminders
Tips and Tricks
All Tips & Tricks
What's New in v4.10
Messages
(NEW)
There is a buzzword appearing
insurance professionals: CRM,
Work From Home Resource
Many insurance agencies are

Dark Blue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HawkSoft Cloud Status
Agency Announcement
Customize your message here...
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To Do
Suspenses (4)
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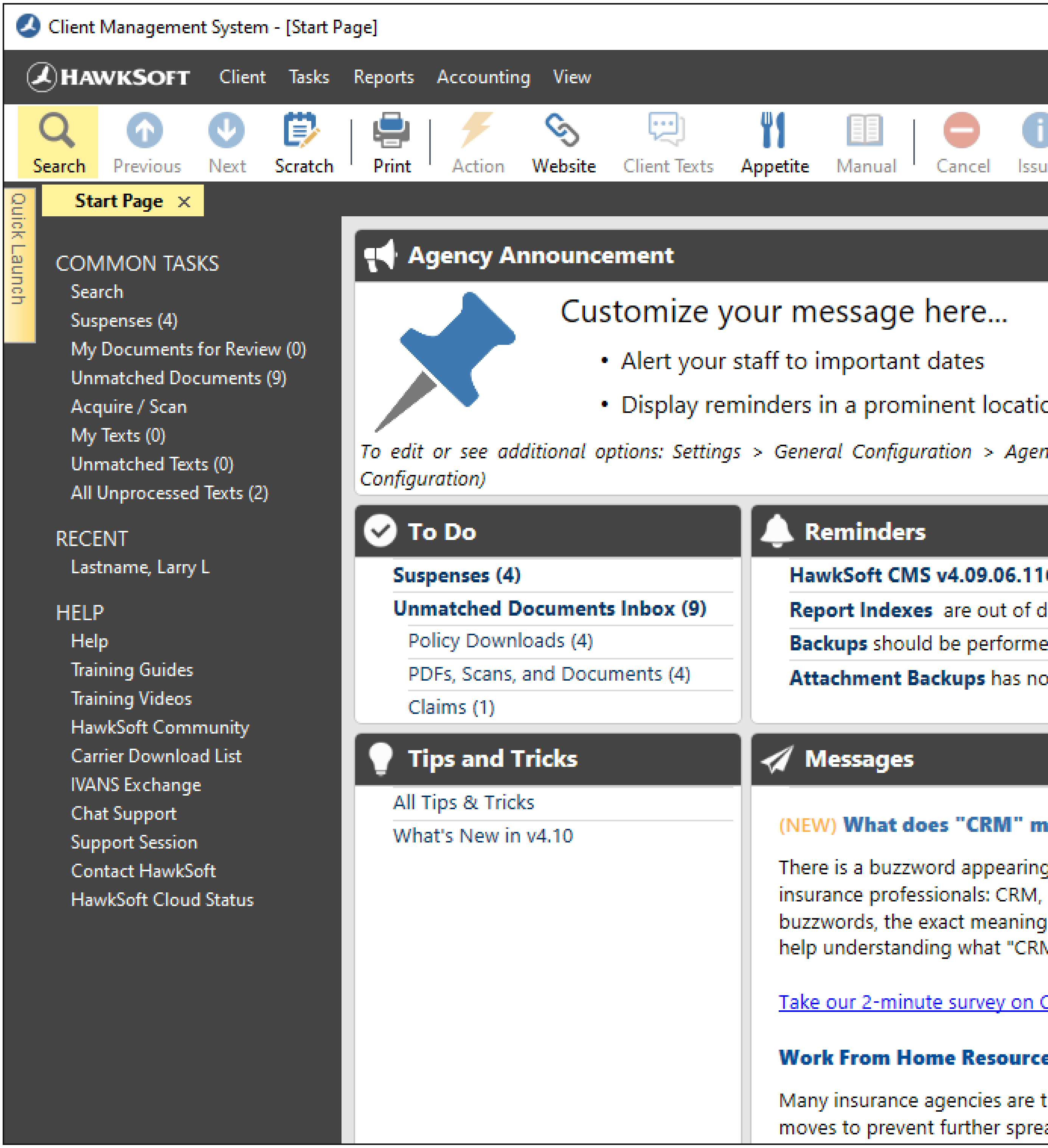
Policy Downloads (4)
PDFs, Scans, and Documents (4)
Claims (1)
Reminders
Tips and Tricks
All Tips & Tricks
What's New in v4.10
Messages
(NEW)

Dark



Related Topics

[User Preferences]
[User Setup Overview]

Shortcuts to External Tools [+ Video]

Setting up an External Tool enables you to configure a shortcut that links to a website or program (application) of your choice. You can set these links to appear on the Tools menu, the Quick Launch panel, and/or the main CMS toolbar.

External tools can launch applications only if the application is installed on the same computer CMS is running on.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Setup > Computer Specific Settings

See Setting User Permissions for more information.

In this topic:

To set up a website or program

1. Click the **Settings** icon, and then select **Computer Specific Settings** from the main CMS menu bar.

   The **Computer Specific Settings** dialog opens.

2. Click the **External Tools** tab.
3. Click **New** to set up a new external tool, and complete the following:
   - **Tool Name** – Name the external tool.
   - **Tool Type** – Select **Program** (application) or **Website** from the drop-down list.

- **Tooltip** – Enter the tool name as you want it to appear when you hover your mouse over the toolbar icon.
- **Help Text** – Enter a description of the tool. This can include the keyboard shortcut associated with the toolbar button.

  This description appears as part of the Tooltip when you hover your mouse over the toolbar icon.
- **Command** – Enter or browse to the program (application) path or website URL:
  - For a website, enter the URL
  - For a program, enter the path to the .exe file

    See the following table for a list of common programs and commands:

Tool Name	Command
Excel	Excel
Outlook	Outlook
Word	Winword
PowerPoint	Powerpnt
Chrom-	Chro-

Tool Name	Command
e	me
Internet Explorer	iexplore
DS-Pro	DS-Pro
Publisher	mspub

- **Arguments** – Use to send command line arguments to the EXE. (Optional: Used only when the tool type is Program.)
- **Initial Directory** – This field automatically defaults to the same path as the Command field. (Optional: Used only when the tool type is Program.)
- Select **Show on Tools Menu**, **Show on Quick Launch Panel**, and/or **Show on Toolbar** to designate where links to the tool appear.

4. Click **Test** to verify your setup.

   Your program or website launches.

5. Click **OK** to save changes and return to the **External Tools** screen.
6. Click **OK** to close the Computer Specific Settings dialog.

   A link to the new tool displays in CMS at the designated location.

Additional button options on the External Tools screen

- **Edit** – Highlight an item from the list, and then click **Edit** to modify.
- **Delete** – Highlight an item from the list, and then click **Delete** to remove the link.
- **Arrows** – Highlight an item from the list, and then click the Up or Down arrow to move the items up or down on the list.
- **Separator** – Click to insert a dividing line that displays between external tools you have designated to show on the main CMS toolbar. If selected, CMS adds a separator to the bottom of the external tools list, and then you can use the navigation arrows to place the separator.

Related Topics

Customizing the CMS Toolbar

HawkSoft CMS Installation and Network Options

In order to successfully install and use HawkSoft CMS at your agency, you must have a network configured to meet your agency needs prior to the installation. This article describes three common networking options to help your agency IT Admin determine the best networking option for your agency.

> HawkSoft, Inc. is not responsible for your agency network setup. See your agency IT Admin to determine the best networking option for your agency.

HawkSoft CMS also provides the HawkSoft Online option. See for more information.

> HawkSoft CMS has been developed and tested in the operating system and network environments specified on our System Requirements page. HawkSoft, Inc. cannot guarantee performance of CMS and is limited in the scope and type of troubleshooting available for networks that do not meet these requirements. For operating system, hardware, and network requirements, please see HawkSoft System Requirements.

In this topic:

- Installing Hawksoft CMS on a Local Network
- Installing Hawksoft CMS on a Terminal Server
- Installing Hawksoft CMS to Terminal Server for both Remote Desktop Users and Local Network Users

Installing HawkSoft CMS on a Local Network

A local network is typically used when all agency employees work in the office and access CMS from their office workstations (no remote access). This type of network has one computer configured to act as the file server that shares the HawkSoft CMS program and data with the other computers at the agency.

Program files are copied from the server to the local workstation directory. This configuration enables the program to run on each workstation, rather than across a network.

Technical NOTE: CMS is installed to %LOCALAPPDATA%\HawkSoft\CMS\Program.

%LOCALAPPDATA%	
Windows 2000	C:\Documents and Settings\<user name>\Local Settings\Application Data
Windows 10, Windows 8.1, Windows 7, andWindows Vista	C:\Users\ <user name>\AppData\Local

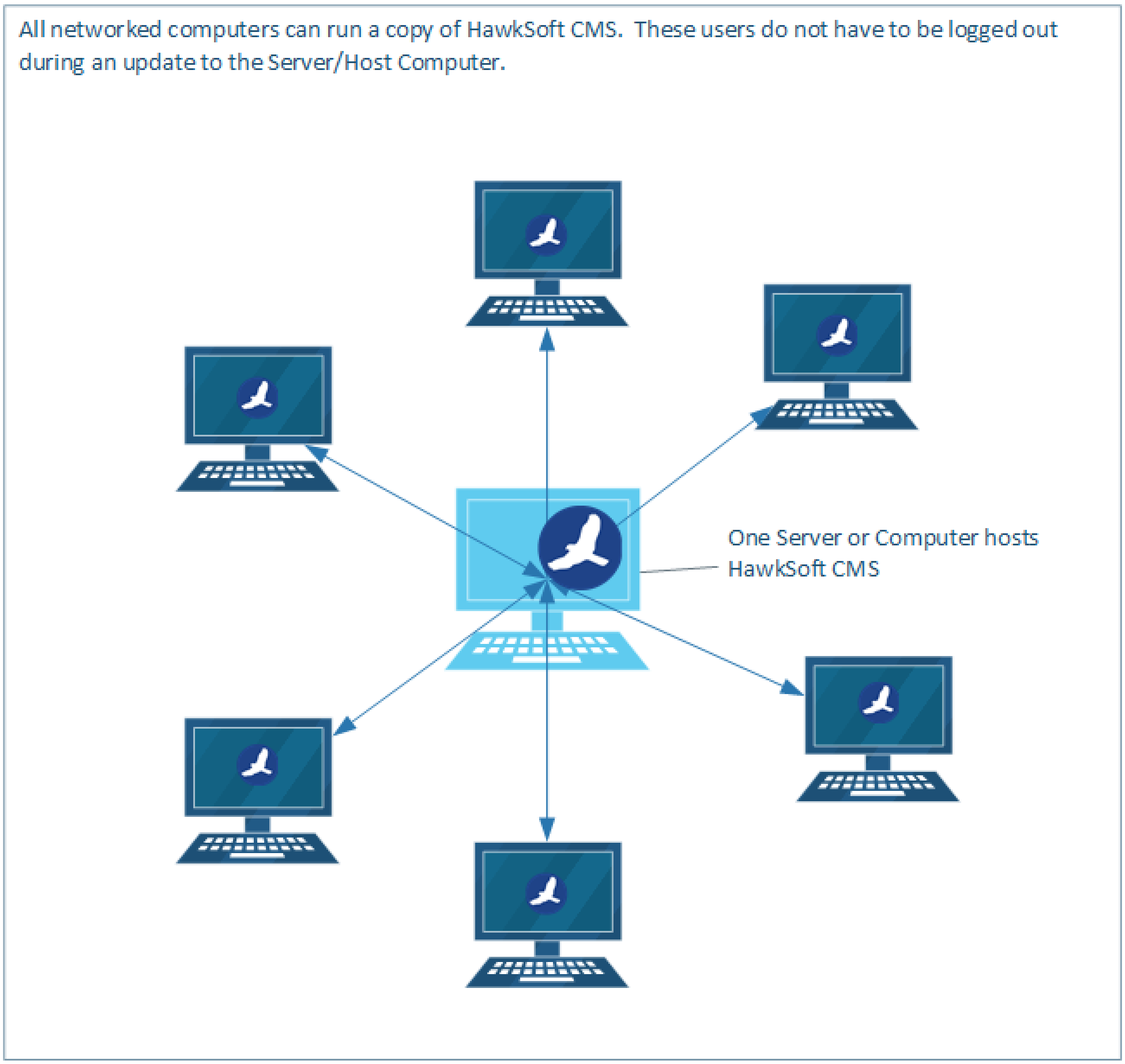
The data and other relevant files will remain on the server. The local CMS.exe will check for updates on the server and copy and install components to the local User Appdata folder as necessary.

Local network setup must include:

- A domain-based (recommended) or peer-to-peer network
- A computer configured to act as file server, running a supported operating system
- A network shared folder where HawkSoft CMS will be installed

  This must be configured to allow all CMS users full control of the share.
- All workstations must have a network drive mapped to the network share in order to access CMS

The following diagram illustrates a network configuration for local network users:



Installing HawkSoft CMS on a Terminal Server

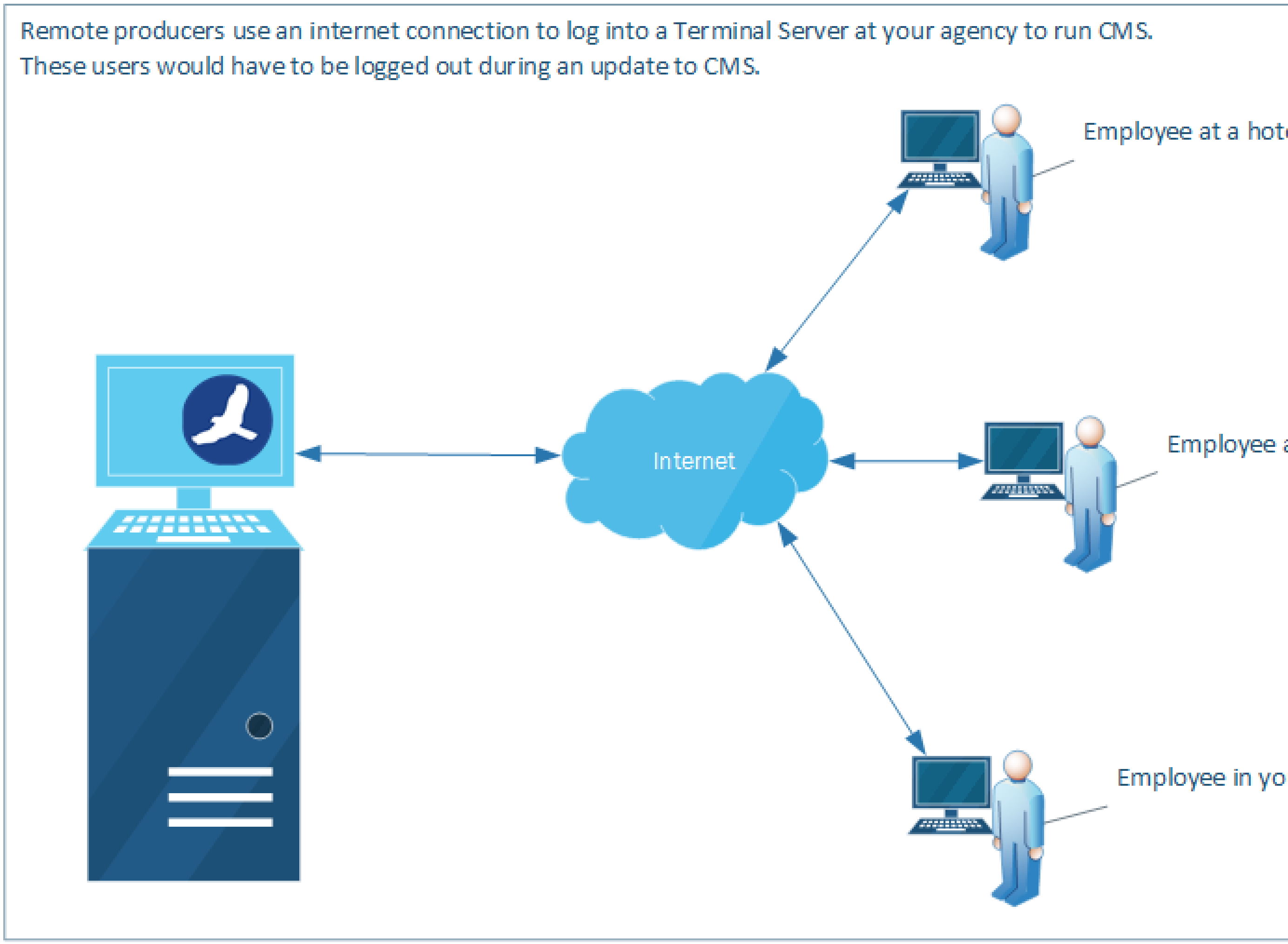
> Agencies running HawkSoft CMS on a terminal server that is running Windows Server 2019 may experience a notable slowness. If your agency experiences this issue, your agency technician can follow the steps in the Windows Server 2019 Slowness with Terminal Server Users article for possible solutions.

A Terminal Server is typically used when an agency needs to enable staff to remotely access a server at your agency to run CMS.

For agencies using Terminal Services, HawkSoft CMS can be configured to run on a Terminal Server during the installation process.

For agencies switching to a Terminal Server after installation, see General Settings for detailed instructions.

The following diagram illustrates a network configured for Remote Desktop users:



Installing HawkSoft CMS to Terminal Server for both Remote Desktop users and Local Network users

HawkSoft CMS can be configured for agencies with both remote users and users who log into a local network from inside the office. This configuration enables agency staff to:

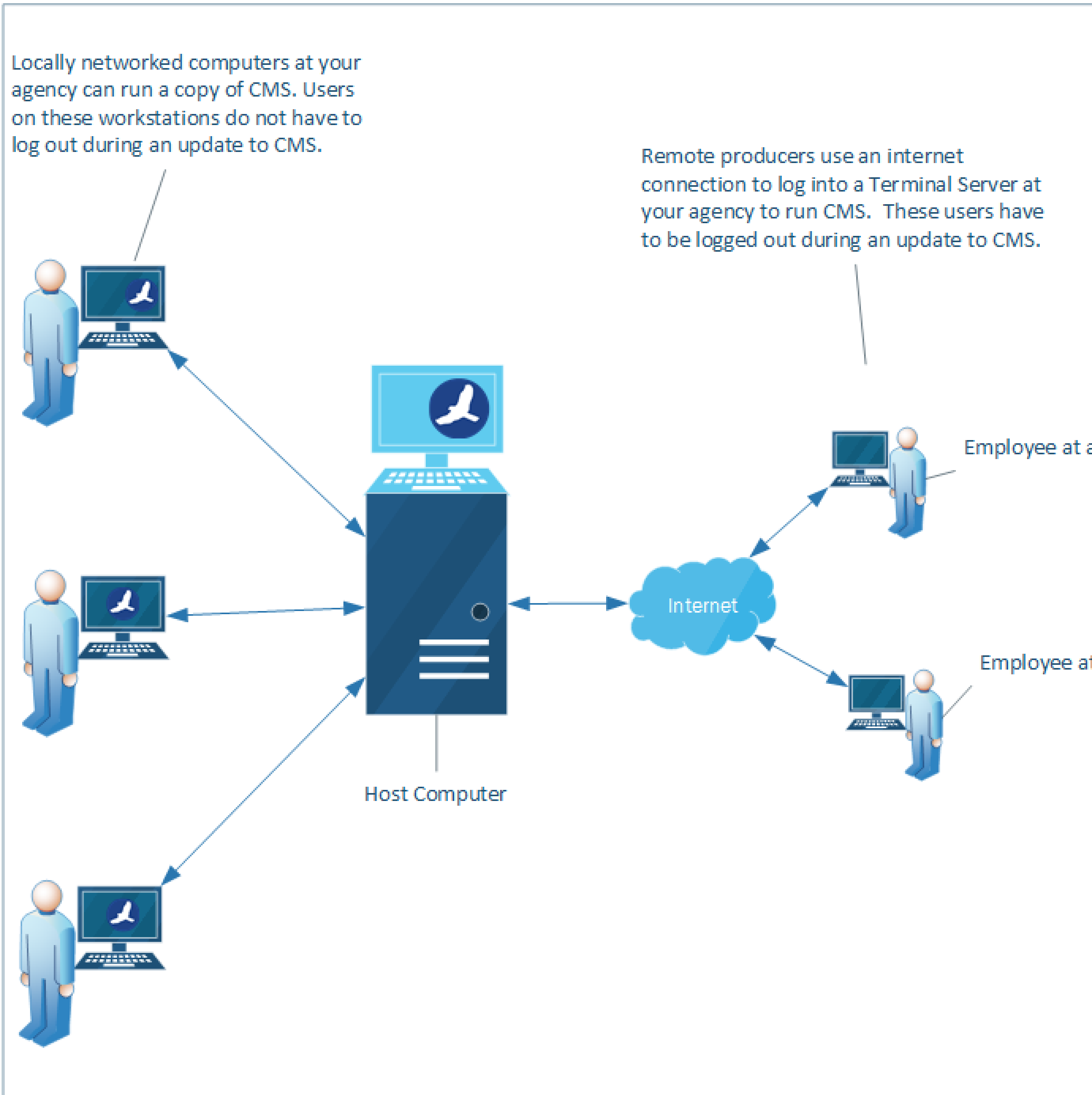
- Optimize HawkSoft CMS to install and run on computers in the office from a local network

  Workstations that will run CMS locally need to be configured during Workstation Setup.

  See and Computer Specific Settings [+Video] for instructions.

- Access CMS remotely from a Terminal Server when working from outside the office

The following diagram illustrates a network configured for both Remote Desktop users and local network users:



Related Topics

[Computer Specific Settings [+Video]]
[Installing HawkSoft CMS Using Microsoft Windows]