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.

HawkSoft Essentials Overview

We at HawkSoft, Inc. want your experience using the HawkSoft Client Management System to be enjoyable and productive. CMS is designed to give you the greatest flexibility possible, while putting the tools you most frequently use at your fingertips.

The topics in this section of CMS Help provide you with information about:

Logging In

This article provides instructions for the correct way to log in and log out of HawkSoft CMS. Once you've logged in, CMS Help is available by clicking the links on the Start Page.

Logging In and Out of HawkSoft CMS

Tour of the CMS Start Page

The CMS Start Page is your gateway to all the tools and information you need for performing a variety of tasks.

Tour of the CMS Start Page

Toolbar Icons

The CMS Toolbar provides shortcuts for the most frequently used functions. Most CMS toolbar items are accessible only from within a client file once a policy has been selected.

Toolbar Icons

The Action Menu

The Action menu is a transaction wizard that provides users with the tools to manage client files and policies, and create documentation of all transactions. All changes made to client files and policies are made using the Action menu.

Action Menu

Tour of the Client File

HawkSoft CMS stores all client and policy information in the client file. This article helps you navigate the client file and gives you an overview of all the features available.

Tour of the Client File

Client File Right-Click Menus

Different right-click menus are available within the client file, depending on where your cursor is located when you right-click. To access the menus, right-click on the Client tab, Client/Policy bar, in the Log Note window, or Attachments window. This article describes the options that are available in each of the right-click menus.

Client File Right-Click Menus

CMS Keyboard Shortcuts

This topic contains a list of commonly used keyboard shortcuts that can increase efficiency and productivity.

CMS Keyboard Shortcuts

Best Workflow Practices

Thorough and consistent data is important to ensure accurate reporting and successful integrations with third-party vendors.

The following articles are intended to help your agency implement best practices when inserting data into HawkSoft.

Database Maintenance

Running the Freshen Indexes utility should be part of your agency's weekly routine to ensure accurate data in your reports.

Freshen Indexes [+Video]*

Linking Profiles with Contact Information

Your agency can provide third-party applications to your customers to enable them to view their policy data. Before integrating with a third party application, you will want to make sure all of your Named Insureds/Main Contacts have an email address associated with them.

This article provides instructions for linking new and existing profiles with contact information.

Linking Profiles with Contact Information

Configure Required and Default Information

A good way for your agency to avoid omissions is to require that certain fields are completed. You can use Required and Default field settings to ensure information is not left blank when a record is added or updated.

Configuring Default Fields for your agency

Important Data for Accurate Reporting

HawkSoft CMS has several reports available to help your agency create, filter, and summarize client, policy, and agency data. The Agency Intelligence and Sales & Retention predefined reports are available to help your agency track Key Performance Indicators, sales pipeline data, and renewal data.

To get the most accurate and helpful information from these predefined reports, it's important that your data is entered correctly and consistently in CMS.

Important Data for Accurate Reporting

Important Data for Tracking the Sales Pipeline

The sales pipeline tracks the policies in your sales funnel to help you make data driven decisions about how the sales team is performing/closing sales.

This article provides tips on the most valuable information to enter when inserting or rewriting a policy to ensure you can track the policies in your sales pipeline and get accurate results on reports.

Important data for the Sales Pipeline

About Policy Dates

The status of a policy in HawkSoft CMS indicates where that policy is in its life cycle. The policy status can be changed manually through the Action menu, or automatically updated by a carrier download. You can run reports in CMS based on the status and the status date to measure and track your business on a granular level. To get the most accurate and helpful information from these predefined reports, it's important that your data is entered correctly and consistently in CMS.

This article is intended to provide an explanation of the Date fields on the General Policy Information screen and how to enter dates correctly for accurate reporting.

Policy Dates

About Policy Statuses

The status of a policy in HawkSoft CMS indicates where that policy is in its life cycle. The policy status can be changed manually through the Action menu, or automatically updated by a carrier download. You can run reports in CMS based on the status to measure and track your business on a granular level.

This article describes the statuses and sub-statuses available in CMS and how to manually change the status of a policy.

About Policy Statuses: The life of a Policy

Download Settings Best Practice

Your agency can provide third-party applications to your customers to enable them to view their policy data. Before integrating with a third party application, It is recommended that your agency processes downloads each day to keep your data current in third-party applications.

Best Practices: Download Settings