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 Tips and Tricks [Tips & Tricks]

Welcome to HawkSoft's Tips and Tricks! We hope you will find the following shortcuts and useful business practices helpful in streamlining your workflows and increasing your productivity.

1230 SE 3rd Ave.

- Right-Click Menu Log Notes
- Right-Click Menu Attachments
- Quickly Copy Client/Policy Data
- Open an Additional Instance of HawkSoft in a Second Window
- Refresh a Client
- User Preferences
- Customize Columns on the Client File View
- Customize Columns when viewing Claims
- External Tools
- Toolbar Shortcuts
- Policy Snapshots
- Keyboard Shortcuts
- Need Help? Chat Us!

If you have a tip or trick that you'd like to see posted, please email helpsystem@hawksoft.com.

Please include "Tips & Tricks" in the subject line.

Log Notes Right-Click Menu

Once a Log Note is created on a client/policy, you can open the Log to review the notes and perform additional actions on the Log. Additionally, a menu is available from the Log Note list, enabling you to take the same actions without opening the Log.

Using the right-click menu in the Log Note window

To open the menu, open a client file, and then right-click on a selected Log Note in the Log Note window.

Menu Item	Function
View	Expand or zoom the selected log entry.
Print	Print the selected log entry to your printer or the HawkSoft CMS Virtual Printer.
New Log	Right-click on a selected log note to create a new log entry and link it to a selected log entry. See Linking Log Notes for more information.
Append Log	Add additional information to the bottom of the selected log entry. See Appending a Log Note for more information.
Copy to	Copy the selected log entry to another policy or client. This option also gives you the opportunity to void the log entry from the original location once the copy is complete. See Moving a Log Note for more information. **NOTE**: Attachments will NOT be included with the copied/moved log note. See for more information.

Menu Item	Function
Suspend	Create a Suspense for the selected log entry. See Suspending a Log Note for more information. **NOTE**: This menu item is **ReSuspend** if the log has been suspended.
Close Suspense	Close a suspended log entry. See Accessing and Working with Suspenses for more information.
Add Client Tag	Create a tag on a Client file. See Client Tags [+video] for more information.
Void	Void the selected log entry. See Voiding a Log Note for more information. **NOTE**: If the log note is suspended, void will not be an option until the suspense is closed.
Unvoid	Restores a log note that has been voided. **NOTE**: This menu item is only available when right-clicking on a voided log note.
Show Voided Log Entries	View any log entry that has previously been voided on the viewed client file.

See the Log Notes Overview for more information.

Attachments Right-Click Menu [Tips & Tricks]

Once documents are attached to the client/policy, they are easily accessed from the Attachments List in that client/policy. You can use the available right-click menu to open, modify, and manage attachments.

This article describes the options that are available in the attachments right-click menu.

While all users have access to the right-click menus in the client file, some features may not be available based upon individual user permissions.

Using the right-click menu in the Attachment window

To open the right-click menu, click on the Attachments tab in a client file/policy, and then right-click on one or more selected attachments to access the menu.

Menu Item	Function
View	Open the selected attachment in the CMS Viewer. PDF attachments open in the CMS Viewer if **Launch PDF file with viewer associated with Windows** is unchecked in General Configuration Settings.
Create Working Document	Modify an encrypted document, such as an Agency Checklist. See Working Documents for more information.
Copy	Copy the attachment(s) to your Windows® clipboard, and then paste into another location, such as your desktop or an email. Once pasted, the attachment keeps the Description name as the file name. See Save Attachments to Your Computer for more options.
Copy Path	Copy the file path to your clipboard. Useful for carrier websites that upload documents from pasted file paths. See Upload Attachments to a Carrier Website for more information.
Send for E-Signature	Send the attachment for electronic signature. See Send Document for E-Signature for detailed steps. See E-Signature Configuration: DocuSign or RightSignature to configure E-Signature with your vendor.
Track Submission	Track the document once it has been submitted to a carrier.

Menu Item	Function
	See Track Submissions for more information.
Email	Select an attached email, and then select **Email** > **Reply**, **Reply All**, **Forward**, or **Send as Attachment**. OR Select an attached document, and then select **Email** > **Send as Attachment**. The attachment will retain the Description as saved in the Attachments List. See Email for instructions on emailing from the Attachments list.
Copy To (Unmatched Documents Inbox)	Copy the attachment(s) to the Unmatched Documents Inbox and retain a copy on the existing policy. Once copied, the attachment keeps the Description name as the title.
Copy To (Other Client/Policy)	Copy the attachment(s) to another client or policy, and retain a copy on the existing policy. See Copying an Attachment for instructions.
Move To (Unmatched Documents Inbox)	Move the attachment(s) from the client file to the Unmatched Documents Inbox. This archives the attachment on the Client/Policy. To restore the attachments on the original client file, see **Restore**.
Move To (Other Client/Policy)	Move the attachment(s) from the current client file to a different client or policy. This archives the attachment on the Client/Policy. To restore the attachment on the original client file, see **Restore**.
Assign Document for Review	Send the attachment(s) to a CMS user for review and processing.
Mark as Reviewed	Updates the **Last Processed/Reviewed By** column with the current

Menu Item	Function
	date and your name as the reviewer.
Compare to Previous	This menu option appears only when a Policy Snapshot or Download is selected. Compare changes between two downloads or Policy Snapshots created in CMS. This selection is available only for Policy Snapshot attachments, or attachments received as part of a carrier Policy download. See Comparing Downloads and Policy Snapshots for more information.
Add New Log	Create a new log note and link the attachment. See Linking Attachments to a Log Note for more information.
Link To Log	Link the attachment to an existing log note. See Linking Attachments to a Log Note for more information.
Archive/Delete	Select **Archive** to remove the attachment from view. The file can be viewed and/or restored, if needed. See Archiving/Unarchiving an Attachment for more information. If **Archive Attachments** is not checked in General Settings, **Delete** appears as an option instead of **Archive**. Select **Delete** to open the **Delete Attachment** dialog. You are prompted to move the attachment to the Unmatched Documents Inbox. From the Inbox, you can easily move the attachment to another file. You can uncheck the **Move this attachment to Unmatched Documents** box to permanently delete the attachment, if needed. Deleted files are recoverable only if they have been saved to a backup file.
Restore	Select the **Show Deleted/Archived Attachments** option, highlight an archived attachment, and then click **Restore**. This only applies to

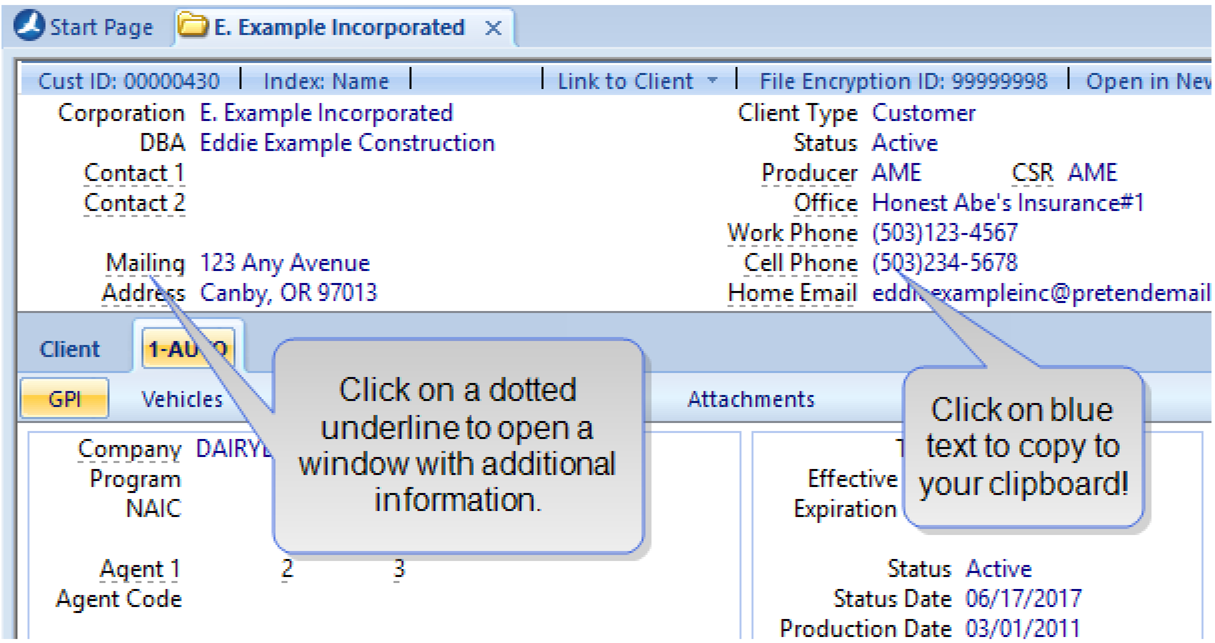
Menu Item	Function
	Archived attachments - Deleted Attachments cannot be restored.
Update Policy	Update policy information, such as coverages and premiums, from a Policy download file. This selection is available only for Policy Snapshot attachments, or attachments received as part of a carrier Policy download.
Send to Support	Send the attachment(s) to HawkSoft Support for review.
Reset Column Order	Reset default column order. Default column order preferences are set in the User's profile. See User Preferences for more information.
Show Deleted/Archived Attachments	View any attachments that have been archived or deleted from this policy. If you attempt to open an attachment that was previously deleted, you are prompted to insert the backup disk that contains the image.
Expand All	This option is available when using the **Group By** filter on the Attachment detail bar. Select **Expand All** to open each attachment group.
Collapse All	This option is available when using the **Group By** filter on the Attachment detail bar. Select **Collapse All** to show the group names only.
Properties	Open the properties view of the attachment file and edit as needed. See Attachment Properties for more information.

See the Client File Right-Click Menus article for more information.

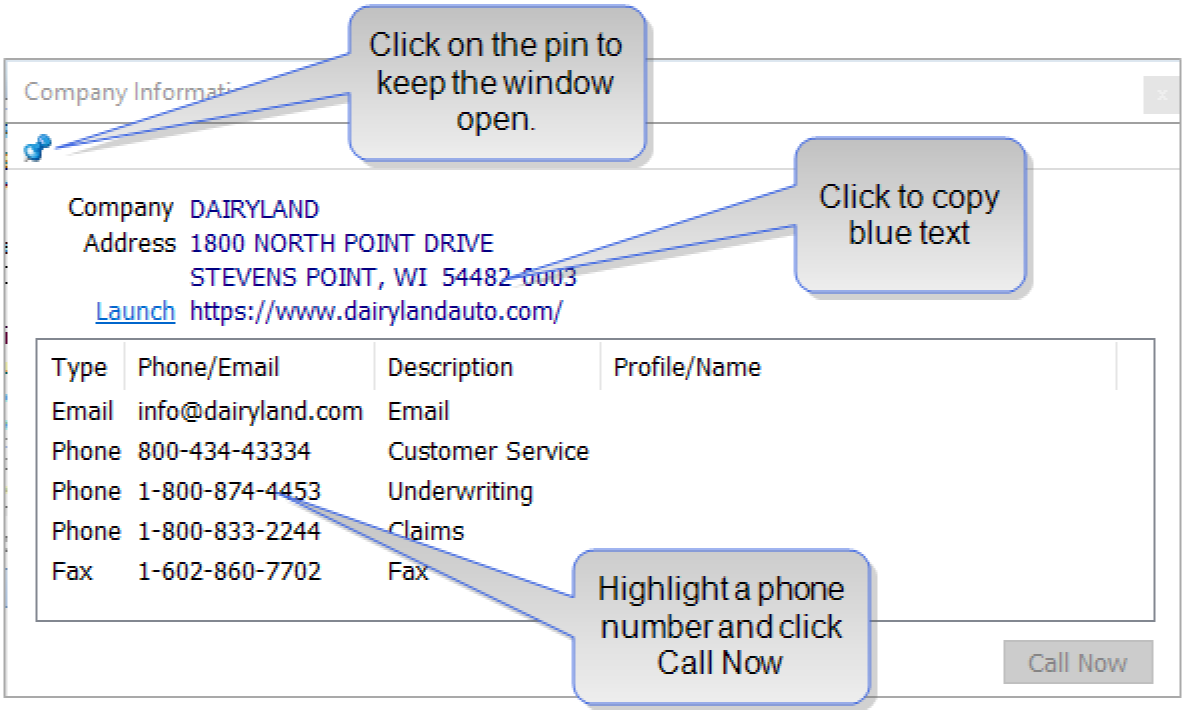
Quickly Copy Client/Policy Data [Tips & Tricks]

When viewing a client/policy file:

- Click on blue data fields to copy the data to your Windows® Clipboard, and then paste the data elsewhere, such as electronic forms and carrier websites.
- Click on underlined fields to open a dialog which displays additional information.



For example, if you click on the underlined Company field, a dialog displays additional Company information.



See Tour of the Client File for more information.

Open an Additional Instance of HawkSoft CMS [Tips & Tricks]

Did you know you can quickly open a second instance of CMS? You might be in the middle of entering information in a client file and then you receive a phone call from a customer. Now you want to open an additional client file without closing the file you are editing.

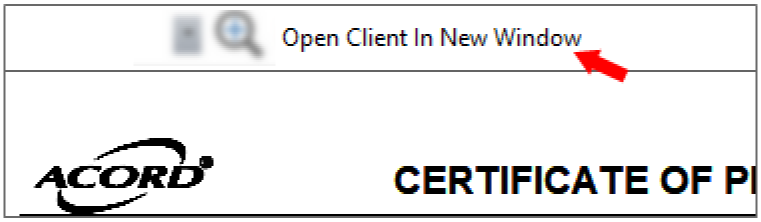
HawkSoft provides multiple options for opening a second instance. You can always use the following keyboard shortcut or click the available button, depending on what screen you are on.

- **Ctrl+Alt+N**

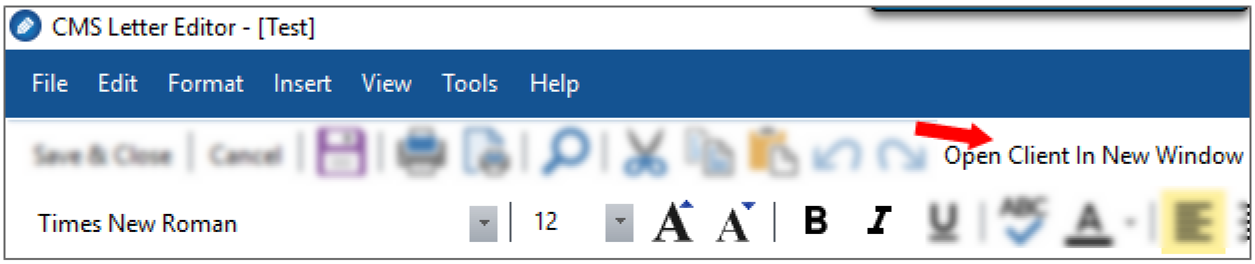
  Click **Ctrl+Alt+N** from any screen in HawkSoft.

  The following buttons are available during workflows that most commonly benefit from information verification from another screen. With the click of a button, you can open a client file in and additional window.

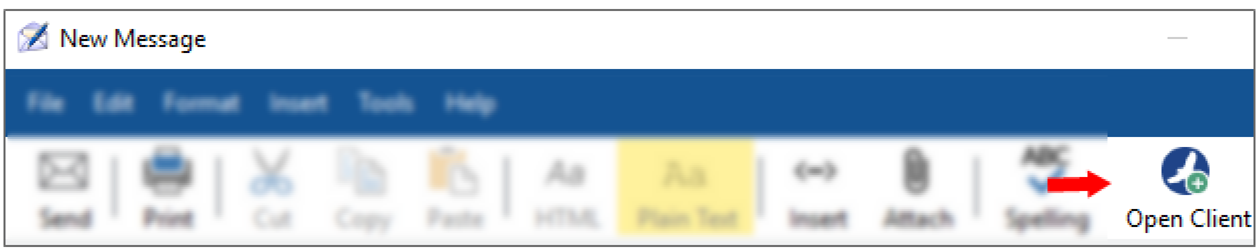
- **ACORD Form Editor**



- **Form Letter Editor**



- **Email Editor**

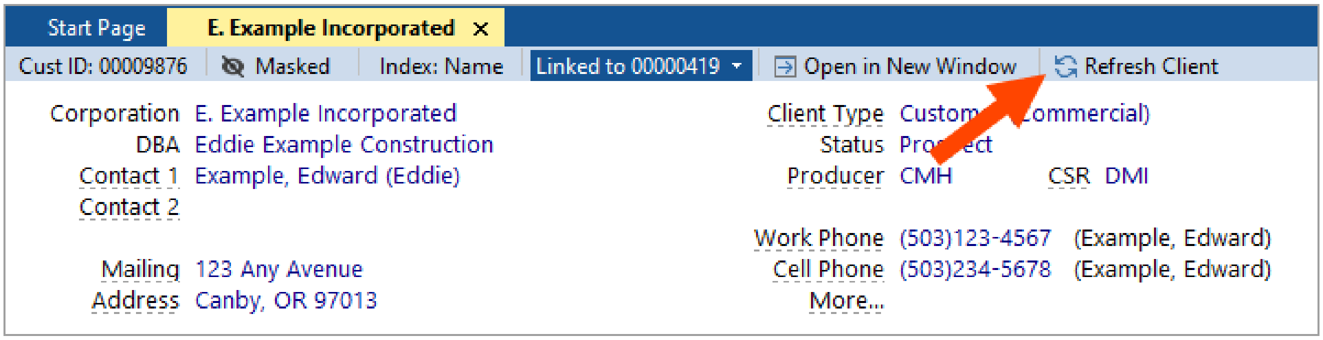


- **CMS Edit Client/Policy screens**

Now you can open an additional client file without exiting out of the file that you are working on.

Refresh a Client

You can check for updates on your currently open client file without closing it. To check for updates click on the **Refresh Client** button, or press **F5**.



User Preferences [Tips & Tricks]

Did you know you can configure your own personal default search parameters when retrieving a client file, as well as control the way HawkSoft CMS organizes client file information, policies, and attachments?

Take a few minutes to review all of the options in User Preferences and configure these settings in a way that is most useful to you. Your preferences will not impact any other users in your agency.

You can access and modify your preferences in a few different ways:

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 [Tips & Tricks] below.

3. Click **OK** to save your changes and close the **Preferences** dialog.

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 [Tips & Tricks], 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.

From the Search dialog

1. Click the 

   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 [Tips & Tricks], 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.

See User Preferences for a detailed explanation of each setting.

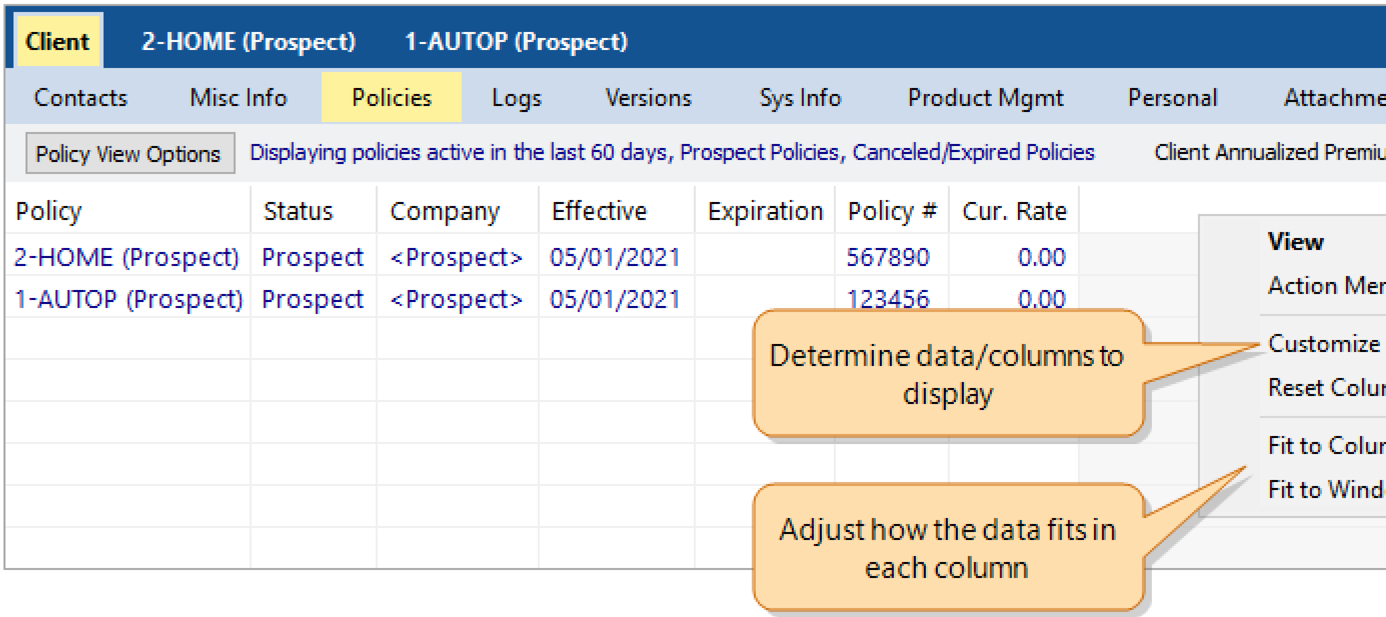
Customize Columns on the Client File View [Tips & Tricks]

Did you know you can determine the Personal Profile information and Policy information you want to view when opening a client file? Customized column views allow you to quickly display the information you most often need to view. Customized column views will automatically save and display each time you choose to view the Personal or Policy data.

To customize the column view

1. Select the client file.
2. Click the **Client** tab.
3. Select the **Personal** or **Policies** tab.
4. Right-click in the heading row.

   The drop-down menu opens and displays the customized column options. You can use this menu to determine the data/columns to display on the Policies tab and/or Personal tab, and you can determine how the data fits within the columns to minimize extra space.

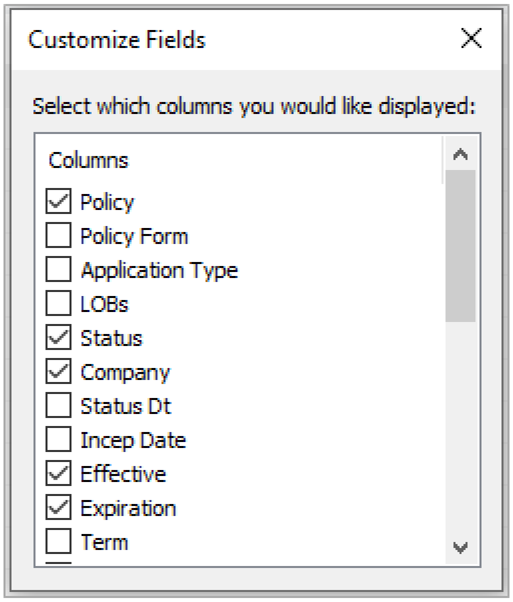


To determine the data to display

You can select the policy data and personal profile data that you prefer to see when opening a client file.

1. Select **Customize Columns** from the drop-down menu.

   The Customize Fields list opens with a list of data fields from the General Policy Information screen or Personal Profile screen.

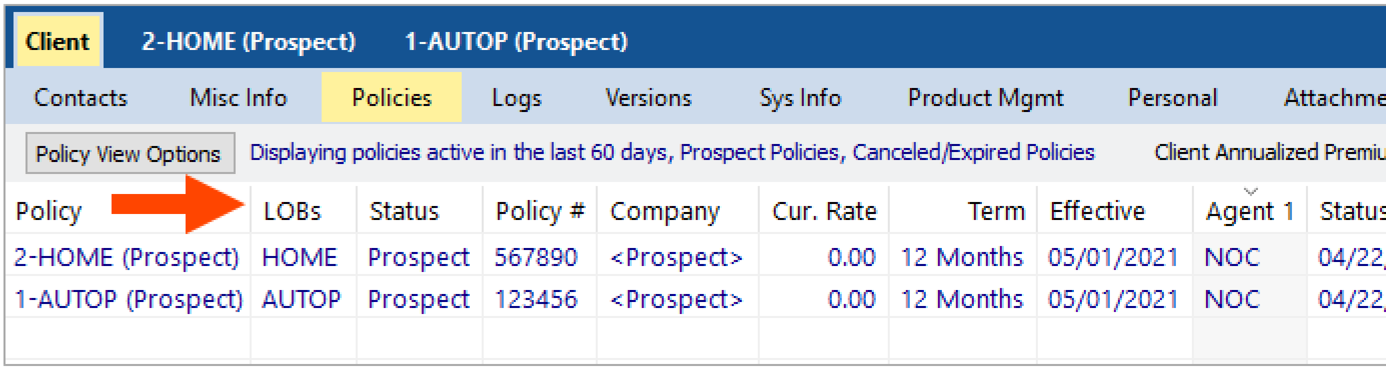
   

2. Select the fields you would like to display in the columns.

   The Personal Profile or Policies list will now display only the data/columns you have selected.

To move the columns

1. Select the **Personal** or **Policies** tab.
2. Left-click on a column header and drag it right or left to reorganize the columns.



The customized column view settings will automatically save and display each time you choose to view the Personal or Policy information.

You can reset the columns to display the default columns, if needed.

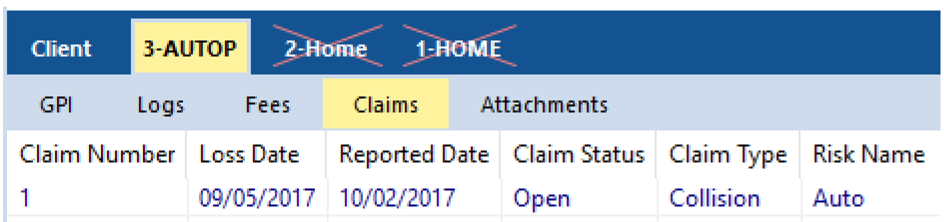
See the Client File Right-Click Menus article for more information.

Customize Columns when viewing Claims [Tips & Tricks]

You can easily view Claims information on a selected client or policy. To view all claims for all policies on a client, select the Client tab, or select a specific policy to view claims for only that policy.

1. Select the **Claims** tab for the Client or policy.

   By default, CMS displays the most commonly viewed information from each claim.

2. You can right-click in the Claims list, and then select **Customize Columns** to add or remove columns.

   The **Customize Fields** dialog opens with a list of each of the Claims fields on the Claims screen.

   Select or unselect the fields to view the Claims data as needed, and then close the dialog.

   - Your column settings are saved for all client/policies
   - Your customized view doesn't impact other users
   - Your customized column settings are applied separately for the Client view and Policy view

3. You can reset the default column settings at any time.

   Right-click in the Claims list, and then select **Reset Columns**.

See the Client File Right-Click Menus article for more information.

Shortcuts to Websites and Programs [Tips & Tricks]

External tools allow you to configure shortcuts that link to a website or program (application) of your choice. These links can be set 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.

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:

Too-l Na-me	Co-m-ma-nd
Ex-	Ex-

Tool Name	Command
cel	cel
Outlook	Outlook
Word	Winword
PowerPoint	Powerpnt
Chrome	Chrome
Internet Explorer	iexplore
DSPro	DSPro
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.

See Shortcuts to External Tools for more information.

Toolbar Shortcuts [Tips & Tricks]

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.

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. See Customizing the CMS Toolbar for required permissions and 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.

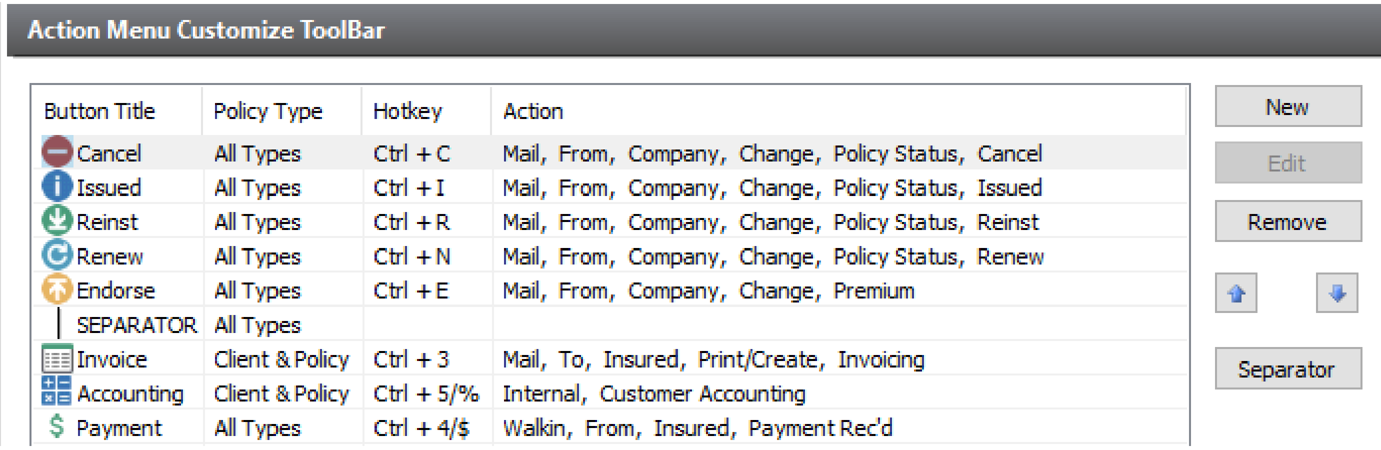
Default Button	Action Menu Shortcut
Cancel	Mail > From > Company > Change Policy Status > Cancel See Changing Policy Status for more information.
Issued	Mail > From > Company > Change Policy Status > Issued See Changing Policy Status for more information.
Reinst	Mail > From > Company > Change Policy 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 cus-

Default Button	Action Menu Shortcut
	tomer 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

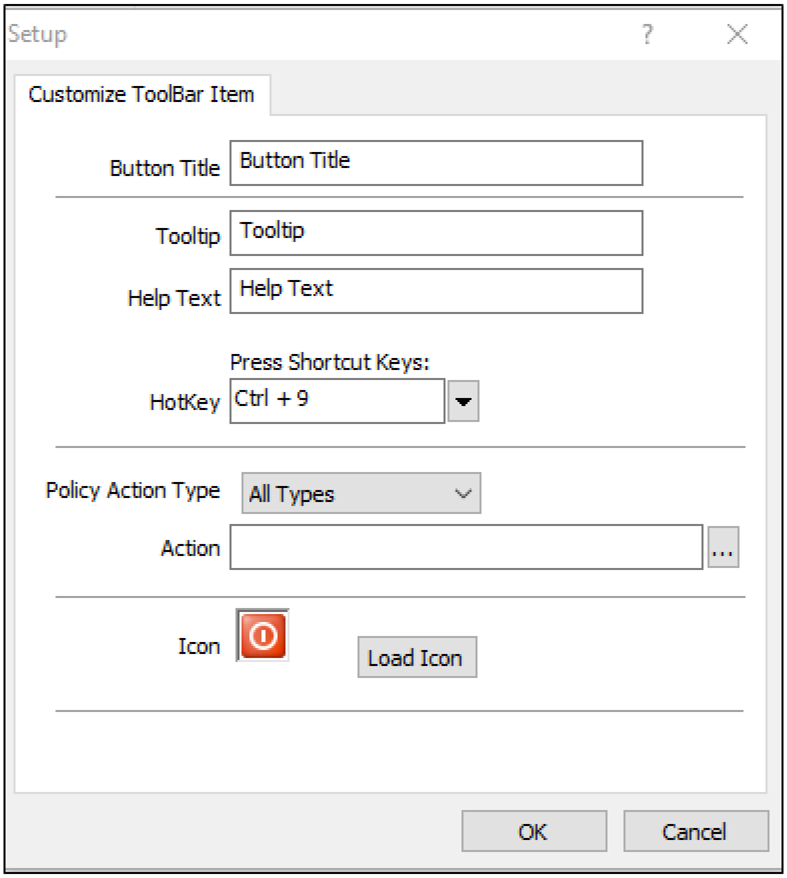
   Action – The Action menu steps performed when using this button.

3. Customize the toolbar as needed.

   New Click to create a new toolbar item.

   Edit 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.

See Customizing the CMS Toolbar for more information or watch the following video:

Policy Snapshots [Tips & Tricks]

HawkSoft CMS enables you to create a Policy Snapshot after making changes to a policy. The Policy Snapshot document looks like a policy download (AL3) file, and includes basic policy information, such as carrier name, Insured's contact information, premium, policy dates, vehicle information, coverages, etc.

When a carrier does not do downloads, using the Policy Snapshot feature is a good way to track and compare manual changes made to a policy over time.

Once the Policy Snapshot is created, it is attached to the policy and the log note. You can open the attachment from the policy, just like opening a policy download attached from a carrier. Like policy downloads, the Download Compare tool can be used to compare two different Policy Snapshot files.

> Ask your agency administrator to configure Policy Snapshot features in General Settings if they are not automatically created. See Policy Snapshot to learn how to configure Policy Snapshots for your agency.

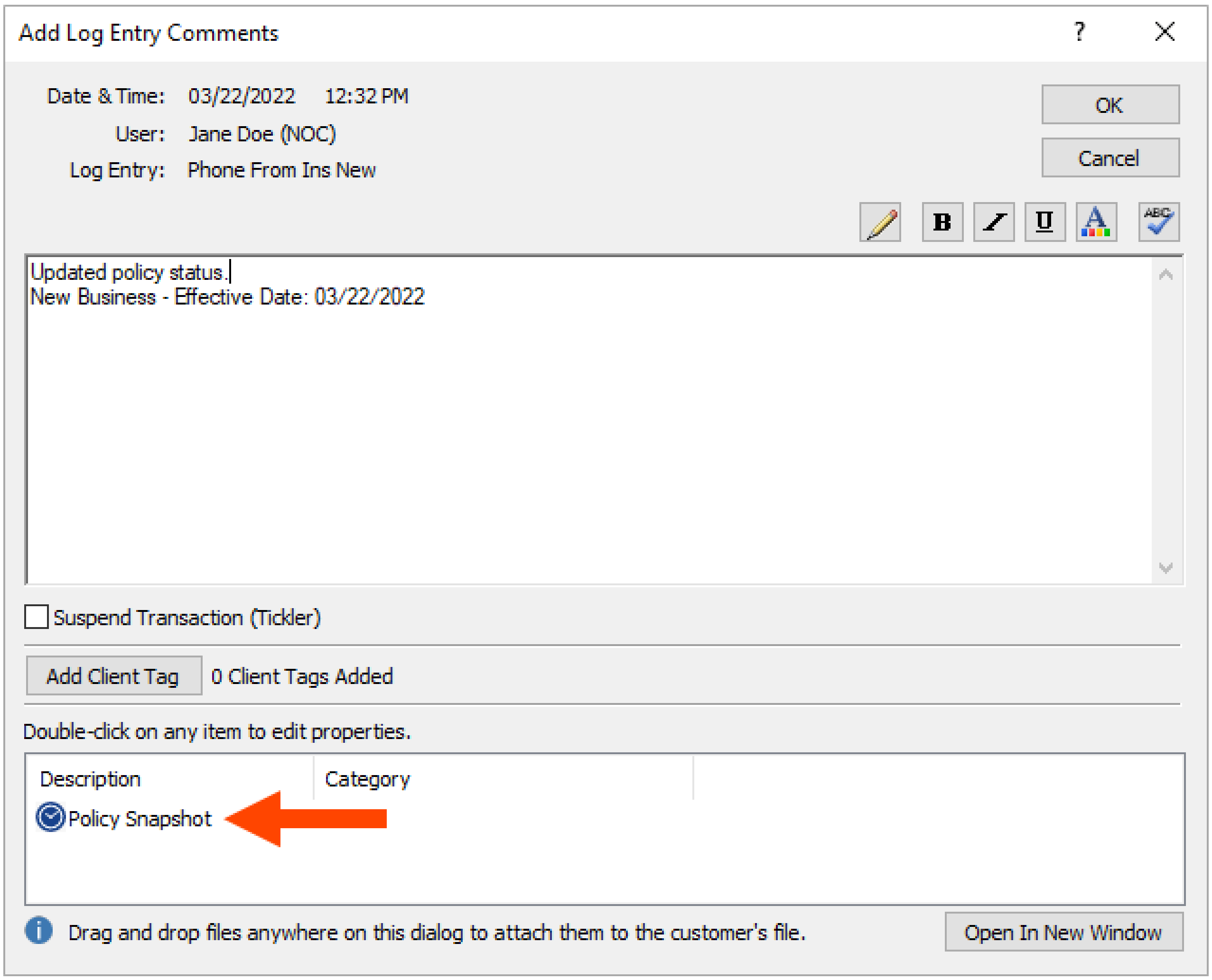
How Policy Snapshots are created

Depending on your agency's configuration, Policy Snapshots are created automatically or they can be created manually.

Automatically

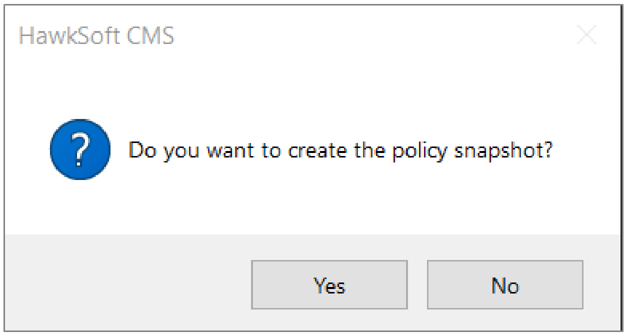
If your administrator configured Snapshots to be automatically created each time a change is made to a policy or has configured Snapshots for the specific carrier on the policy, you will notice the Policy Snapshot attached to the Log Note after you have made your changes.

Once you have saved your Log Note, the Policy Snapshot is listed in the Attachments List for that policy.



Prompted

If your administrator configured a Policy Snapshot prompt to appear after policy changes are made, you can determine if a snapshot should be created based on the changes you just made to the policy.

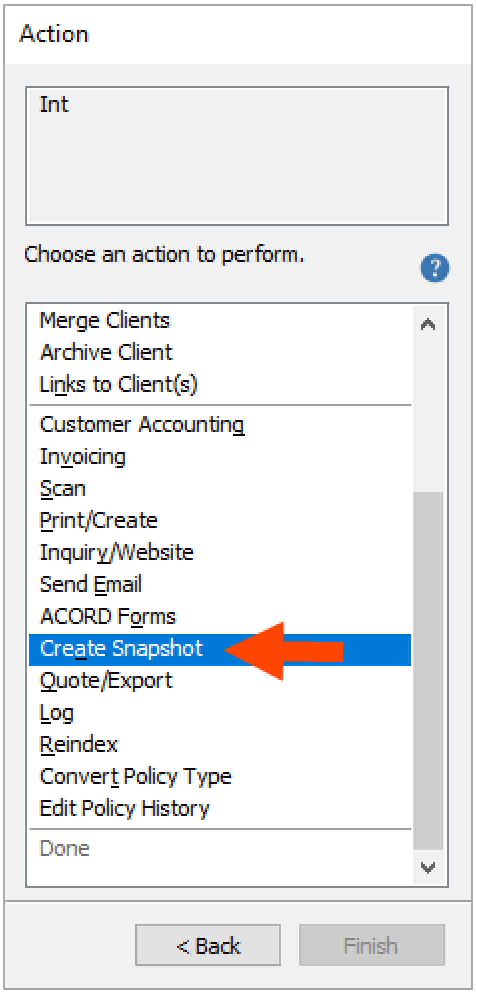


Manually

If your administrator has not configured Policy Snapshots to be created automatically or when prompted, you can choose to manually create a Snapshot after you have saved your policy changes. You must have permissions to the Internal Action Menu to manually create a Snapshot.

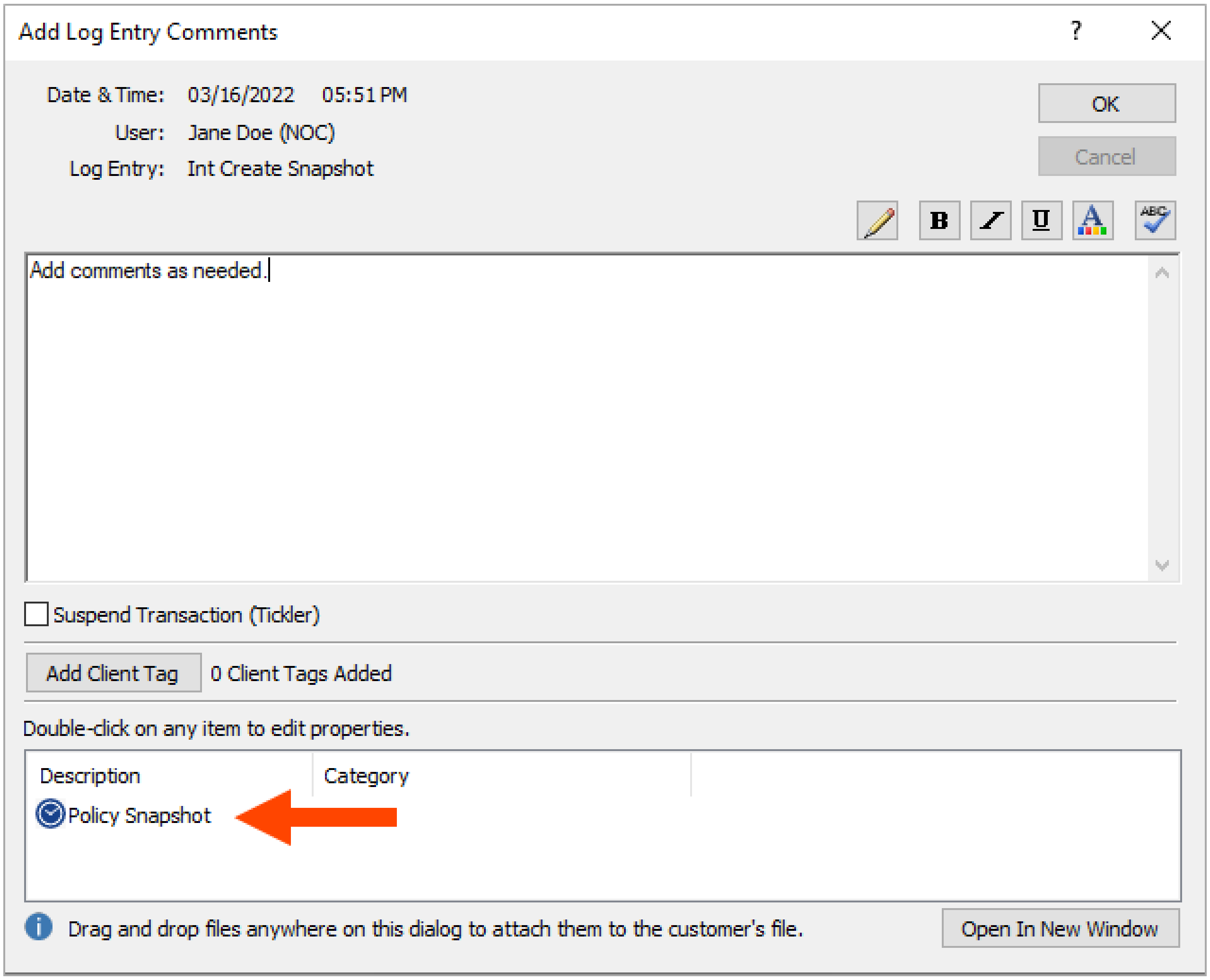
1. Select a client file to open.
2. Click on the policy you would like to create a Policy Snapshot for, and then click on the **Action Menu**.

   The Action Menu opens.
3. Select **Internal**, and then select **Create Snapshot**.



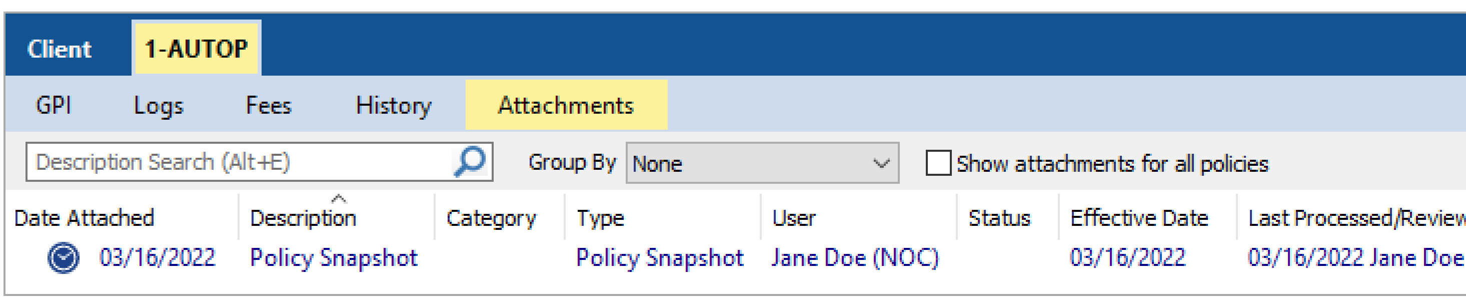
The Add Log Entry Comments dialog opens.

The Policy Snapshot is automatically attached to the Add Log Entry Comments dialog.



4. Add comments, as needed, to the Add Log Entry Comments dialog, and then click **OK**.

The Policy Snapshot is now attached to the policy and can be found on the Attachments tab on the policy file.



Reviewing the snapshot of a policy

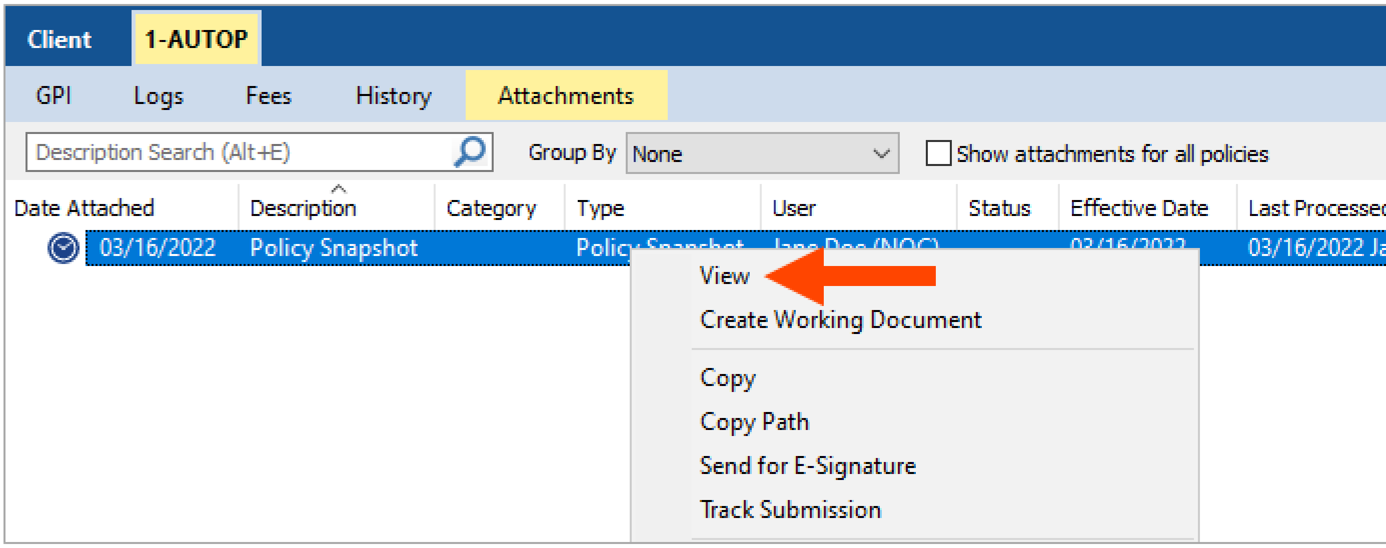
When a Policy Snapshot is created, it is attached to the policy just like a downloaded policy change. The policy snapshot attaches to the log note and you can open the file from the Attachments tab.

Select a Policy Snapshot from the Attachments List, and then use the right-click menu to select one of the following options:

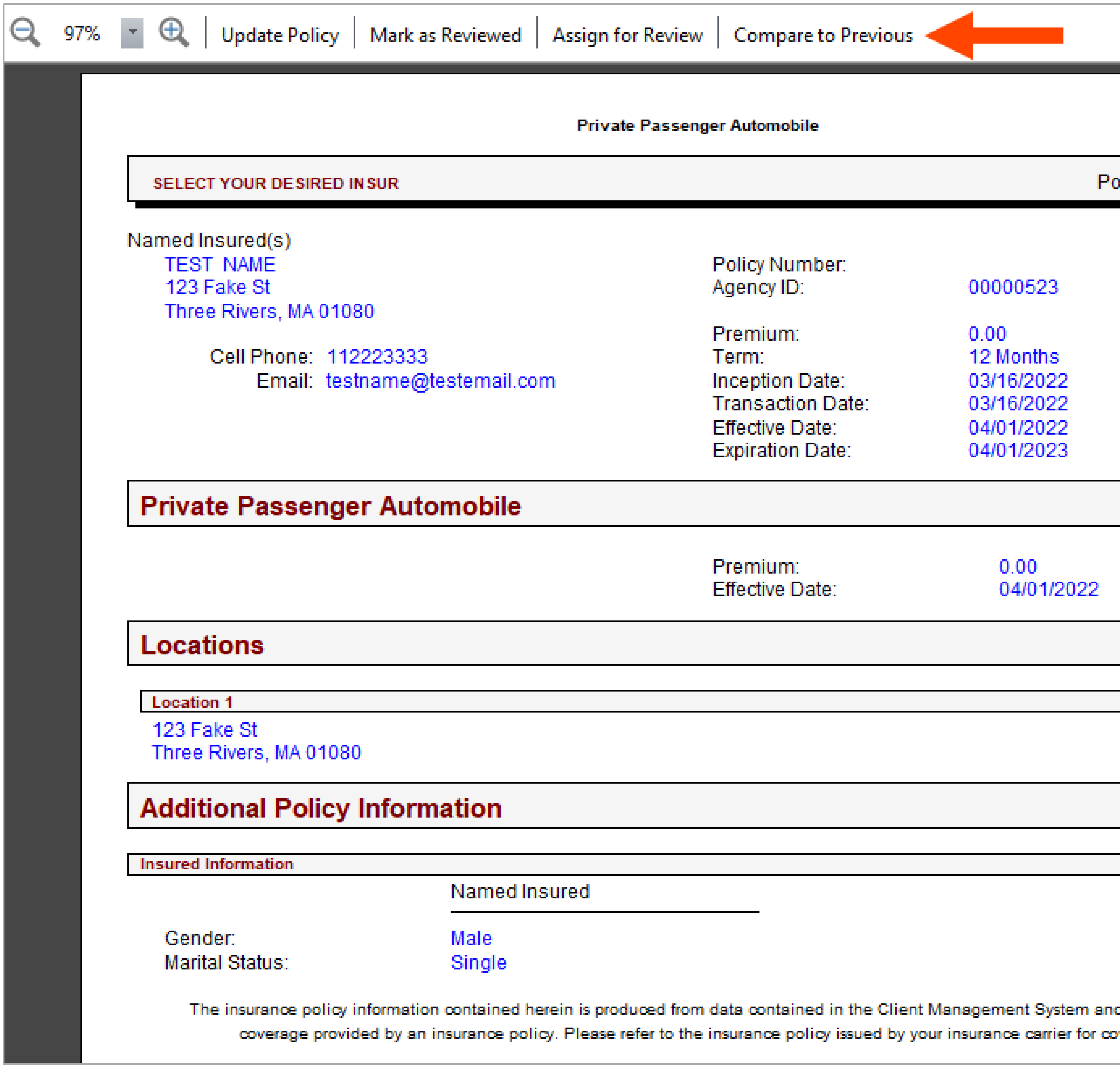
View

Select View or simply double-click on the file to open the Snapshot in the CMS Viewer.

View – Select to open the file to review policy information.



From here, you can assign the Snapshot to another user for Review or click Compare to previous to compare to a previous Snapshot or download



See Working with Attachments to learn about other available options from the right-click menu, such as sending the Snapshot attached to an email or to request an eSignature.

See Policy Snapshot for more information.

Keyboard Shortcuts

Speed up your daily workflows by learning a few key-stroke combinations!

FUNCTION	KEYSTROKE	Available From
Action Menu	ENTER	Client File
Previous/Next Client	PAGE UP/PAGE DOWN	Client File
Move forward across multiple client files and the Start Page	CTRL + TAB	Start Page, Client File
Move backwards across multiple client files and the Start Page	CTRL + SHIFT + TAB	Start Page, Client File
Move from policy to policy. Also opens the LOBs (Lines of Business on policies with multiple LOBs.)	SPACE BAR	Client File
Previous/Next Policy	TAB or SHIFT+TAB	Client File
Navigate Policy Detail Tab	LEFT/RIGHT	Client File
Previous/Next Log Entry or Attachment	UP/DOWN	Selected Item
Opens the Help System	F1	Start Page, Client File
Opens the Search dialog	CTRL + O **OR** F2	Start Page, Client File

FUNCTION	KEYSTROKE	Available From
Opens the Suspense List	F3	Start Page, Client File
Open the selected Log Entry (Client File) or Attachment (Attachment List)	F4	Selected Item
Refresh Client File	F5	Client File
Close the Add Log Entry Comments dialog	F10	Add Log Entry Comments dialog
Opens the Client Menu	ALT+F	Start Page, Client File
Opens the Policy Menu	ALT+P	Start Page, Client File
Opens the Report Menu	ALT+R	Start Page, Client File
Opens the Accounting Menu	ALT+A	Start Page, Client File
Opens the Utilities menu	ALT+U	Start Page, Client File
Opens the Settings menu	ALT+S	Start Page, Client File
Opens the View menu	ALT+V	Start Page, Client File
Opens the Help menu	ALT+H	Start Page, Client File

FUNCTION	KEYSTROKE	Available From
Mail>From>Company>Change Cancelled	CTRL+C	Client File/Policy
Mail>From>Company >Change>Issued	CTRL+I	Client File/Policy
Mail>From>Company Change>Reinstate	CTRL+R	Client File/Policy
Mail>From>Company>Change>Renew	CTRL+N	Client File/Policy
Mail>From>Company>Change>Premium	CTRL+E	Client File/Policy
Online To Company Inquiry/Website	CTRL+W	Client File/Policy
Opens another instance of CMS	CTRL + ALT + N	Start Page, Client File
Selects the indicated menu heading or list item; in the Edit dialog box, moves the cursor to that field	ALT + UNDERLINED LETTER	Selected List
Move through drop-down menu	UP/DOWN	Selected List

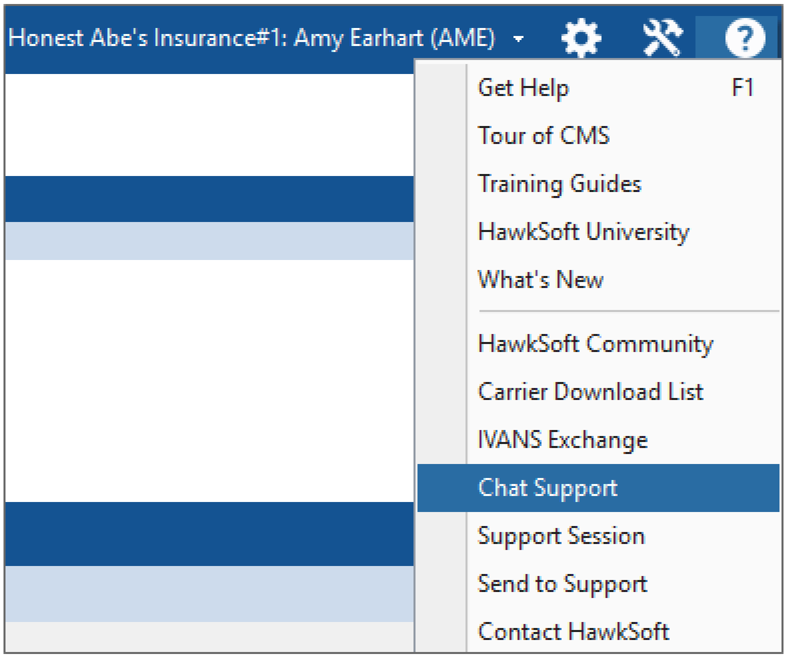
Need Help? Chat Us! [Tips & Tricks]

HawkSoft has a new Chat option to give you the support you need, quickly!

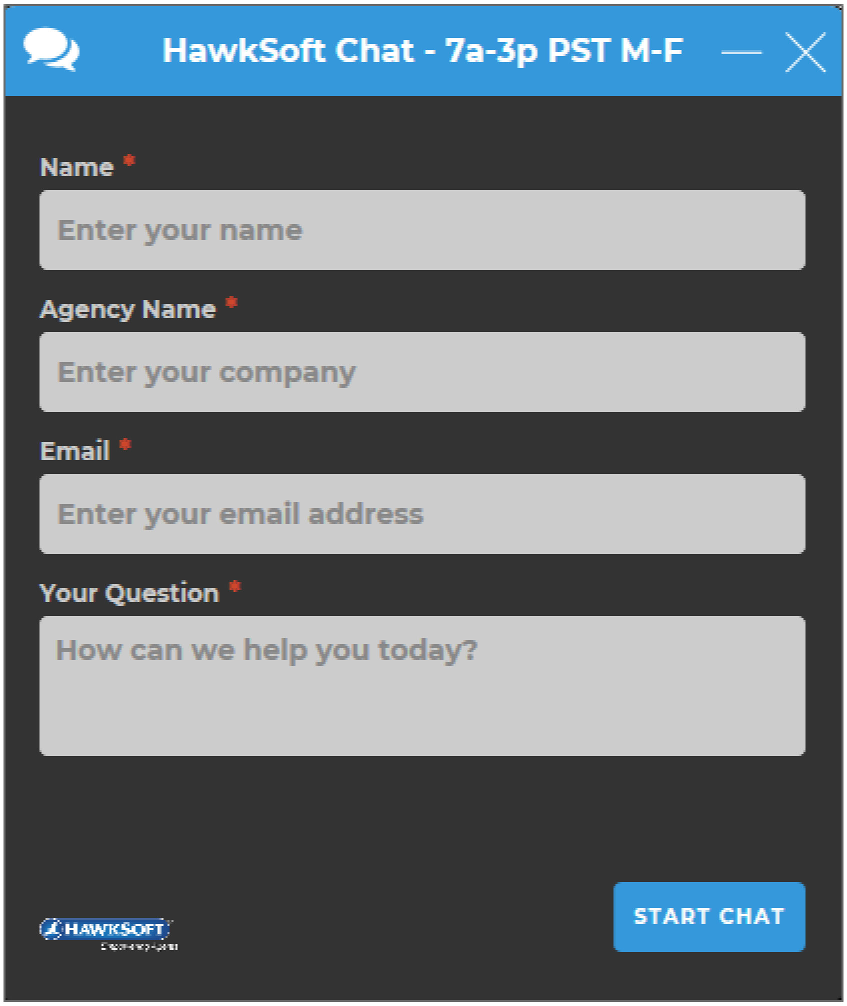
Chat Support is available Monday - Friday 7:00 AM - 3:00 PM (Pacific Time).

> Chat Support is available for local users only.

To access Chat Support, click the Help icon in CMS.



Select **Chat Support** from the menu to access the Chat dialog.



Enter your contact information and some information about what you need help with, and click **Start Chat**.

A Customer Service Representative will reply shortly.

More Tips and Tricks