

HAWKSOFT 6 RELEASE NOTES

Released 10/24/2024

Category	Type	Release Notes
Authentication	Enhancement	A new Domain Access Management area under Agency Setup > Settings allows admins to limit all or selected users to log into the HawkSoft Desktop Application only from desired domains.
Client Subsystem	New Feature	Users once again have the ability to merge clients. We have enhanced the process to include more data than before, such as Contacts, Personal Profiles, Certificates of Insurance, Accounting and Commission data, and more.
Data Replace	Enhancement	Removed restriction on carrier selection when data replace of Policy Title and Policy Form. Allow data replace of Policy Title with default Policy Title.
Downloads	Enhancement	Added support for Additional Interests attached to Scheduled Personal Property to be imported from Download and viewed in the client and on the Download Viewer.
Reporting	Enhancement	Users can run a report and create a log note on all or some of the clients on that report. This includes the ability to create a Task on each of the clients or policies.
ACORD Forms	Enhancement	Added help text when adding an email to a certificate holder during certificate creation or edit notifying users that they can enter multiple email addresses and how.
Correspondence	Bug	Fixed an issue where the correspondence categories were not always visible in the list of categories.