

HAWKSOFT 6 RELEASE NOTES

Released 11/07/2024

Category	Type	Release Notes
Accounting	Bug	Fixed a visual bug with receipts when change was used as the overpayment option that would subtract the change from the total invoiced incorrectly.
Agency Setup	Enhancement	Data Export updated to support SQLite-based data export, replacing CSVs for most Systems.
Reporting	Enhancement	There is now a permission to allow some users to run reports and optionally include an unmasked version of Social Security number and Driver's License number.
Start Page	Enhancement	Added 'Refresh' button to Task widget on Start Page.
Tasks	Enhancement	Agency Tasks now saves the last used "group by" and column sorting.
Email	Enhancement	Users doing an Email > To > Carrier workflow will now have the Policy Carrier checkbox auto selected in the Email Recipients address book.
Letters	Bug	Corrected a rare issue that could cause a failure when using certain letter templates
Client Tab	Enhancement	Added a character counter when editing the client notes field.
ACORD Forms	Bug	Corrected an issue with the Select By function in the Cert Holders dialog when printing a COI. It should now select the expected holders.
ACORD Forms	Bug	Corrected an issue that caused special characters to show incorrectly on ACORD forms.
Summaries	Bug	Fixed issue causing Policy Dec View Summaries and Snapshots to have incorrect Home Coverage Limits.
Email	Enhancement	Modified the HawkSoft Email viewer to make it a little more modern looking.
CMS	Enhancement	Added an additional warning dialog when users merge clients.
Search	Enhancement	Searching for a last name with a space now yields the expected client result. Similarly searching by a first name with a space yields the expected client result.
Data Importer	Bug	Fixed issue with importing DOB on Personal Contact via Data Importer.