

HAWKSOFT 6 RELEASE NOTES

Released 11/21/2024

Category	Type	Release Notes
Accounting	New Feature	Added the ability to create client statements from customer balance summary reports.
Accounting	Bug	Fixed an issue that caused sorting by specific columns in Trust Accounting reports to not sort properly.
Accounting	Bug	Fixed an issue that would cause the issue credit workflow to input the wrong policy information in the check memo field.
Agency Setup	Bug	Fixed bug to display 'Add Term' button when Term is configured as spaces.
Commissions	Enhancement	Added the ability to update matched commission transactions to use the current policy data or policy history during reconciliation.
Commissions	Enhancement	When reconciling commissions, the "Term" column is now next to the "Transaction Type".
Commissions	Enhancement	Fixed an issue that would prevent AL3s with special characters to not be readable by HawkSoft.
Data Replace	Enhancement	User can now 'Revert' a Data Replace process in Error status.
Reporting	Enhancement	Reports now have optional columns to get Main Contact 1 and 2 phone number and email addresses.
ACORD Forms	Bug	The Lookup function in the Excess liability tab of the COI wizard will now flood the Type of Insurance based on the Policy Form selected in the policy information screen. It will default to Occurrence before Lookup is used.