

# HAWKSOFT 6 RELEASE NOTES

Released 12/12/2024

Category	Type	Release Notes
Accounting	Bug	Fixed an issue that would cause EFT checks to be exported to QuickBooks with their check number instead of "EFT".
Agency Setup	New Feature	In Agency Setup > Settings, a new tab for Book of Business Sale allows administrators to export specific client/policy data for a partial Book of Business sale to a non-HawkSoft agency.
Agency Setup	Bug	Resolved issue with Merge Carrier when the carriers have the same NAIC with varying Company Numbers configured for the same State.
Agent Portal	Bug	Corrected an issue in Agent Portal that was causing all logs to display when looking at a policy vs just the policy logs.
Commissions	Enhancement	When viewing the Agent Paid Statements report, users can now drill down into each agent to see transaction details.
Commissions	Enhancement	When adding a new transaction, you can now add a policy number. If added, we will automatically search by that policy number and match the transaction if there is only one match.
Commissions	Enhancement	When reconciling a commission statement, clicking a commission transaction row will begin editing it now. If unmatched, clicking "unmatched" will begin the matching process.
Commissions	Enhancement	Updated the date picker when creating a manual commission transaction on a statement to be consistent with other date pickers found in tasks.
Downloads	Bug	Fixed issue causing the "Most Recent Download" link to launch the wrong download.
Reporting	Enhancement	Quick Reports for all clients/policies or active clients/policies may now be filtered by client or policy office.
Reporting	Enhancement	When running a report there is now a way to immediately download the report as CSV without viewing it in the browser. This is helpful for very large reports which are untenable to view in the browser.
Reporting	Enhancement	A new Quick Report for All Prospect or Lead Policies allows users to start a report with only these policies, saving the steps of summarizing from a report of all policies.
Tasks	Enhancement	Effective, Status, and Expiration Dates are now available columns that may be added to the Task Center, which assists agencies in prioritizing tasks based on policy dates. While viewing a task associated with a policy, you can now also see these dates along with policy number and client CSR.

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Tasks	Enhancement	The toggle to disable the new Agency Tasks UI has been removed, so agencies are no longer able to use the previous Agency Tasks UI. Agency Tasks has been updated to focus more on KPIs and high level reportability.
Texting	New Feature	Added the ability for Texting Administrators to be able to delete conversation threads in HawkSoft Text Messaging.
Text Messaging	Enhancement	Added the ability to delete texting conversations if you have the texting administrator permission. Note: This will delete all incoming and outgoing texts for the phone number in the conversation you delete, regardless of what client it is on.
Batch Email	Enhancement	When restarting CMS if a Batch Email was paused, the Batch Emailer will start again.
ACORD Forms	Bug	Corrected an issue with the address block of the Cancellation form ACORD 035 that could cause address line 2 not to show.
ACORD Forms	Bug	Corrected an issue where building limits and address info would not flood to the ACORD 027 from a BLDRK policy.
ACORD Forms	Bug	Corrected an issue that caused only one page of the ACORD 163 to be added to the ACORD 127 when there are more than 37 drivers.
CMS	Enhancement	Fixed issue causing the "Interface not Registered" when creating a Chang Request Form.
Integrations	Bug	Added ability to bridge multiple LOB's to EZLynx via EZLynx Direct Bridge.
ACORD Forms	Bug	Fixed the DOB format for the First Insured flooded to the ACORD 002 (Loss Notice).
Summaries	Bug	Corrected an issue that would cause Carrier information not to display on Summaries.
Edit Client Policy	Enhancement	The Agent Code dropdown on Policy Information screen has been widened.