

HAWKSOFT 6 RELEASE NOTES

Released 01/09/2025

Category	Type	Release Notes
Accounting	Enhancement	Updated the logic for exporting receipts to QuickBooks: We will now only export items created with the receipt. Any additional items added to the receipt (unapplied credits or other invoices), will need to be exported separately.
Accounting	Enhancement	Added visibility when viewing a Trust Accounting Report if your permissions are preventing some transactions from appearing.
Accounting	Bug	Updated migrated invoices to be able to have a proper invoice footer when printed.
Accounting	Bug	Fixed an issue with accounting reports that would make the selecting the "check all" button in the header would select every row, even when you had summarized the report.
Accounting	Bug	Fixed an issue that would cause offices to not appear as options when searching for transactions the first time.
Attachments	Bug	Fixed an issue that would cause duplicate attachments to be uploaded.
Client Viewer	Enhancement	Made adjustments to color and font in the Logs and Attachments tabs to make them easier to read for a broader range of people.
Commissions	New Feature	When manually creating a commission transaction, you can now automatically start adding another after completing the first one.
Downloads	Enhancement	Downloads now use the new Horsepower, Length, and Speed fields when viewing and importing a watercraft.
Downloads	Enhancement	Added support for the cancellation (removal) of one or more LOB's from a Package Policy, via Download.
Downloads	Bug	Fixed issue with LF in a description causing the AL3 file to not be readable.
Logs	Enhancement	It is now easier to open references on a log: you can click anywhere on the reference to open it!

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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.
Submissions	Bug	Discarding changes when editing a submission will now also discard any attachment changes - if an attachment was removed, discarding the workflow will put the attachment back and vice versa
Tasks	Enhancement	Users can now get up to 365 days worth of closed Tasks while viewing a client's task list.
Tasks	Enhancement	Expanded an option for requiring log notes while editing Tasks. Agencies may now only require a log while closing Tasks, but allow users to edit Tasks without a log.
Setup	Enhancement	Added a new User Preference Email setting for the enhanced Microsoft Office 365 integration.
Email	Enhancement	Added support for Drag & Drop of Email messages directly from Microsoft Office 365 (New Outlook and Outlook.com).
CMS	Enhancement	Move Policy now includes a log note on the target client with additional details about what was moved or copied.
CMS	Bug	Addressed a rare issue that could cause unexpected behavior when printing or attaching through HawkSoft.
CMS	Bug	Addressed a rare issue that could cause unexpected behavior with certain workflows under certain conditions in HawkSoft.