

HAWKSOFT 6 RELEASE NOTES

Released 01/23/2025

Category	Type	Release Notes
Accounting	Enhancement	Added the ability to create a batch of client accounting statements from the Customer Balance Summary report in the End of Period Processing and Reporting site.
Accounting	Enhancement	Batch Accounting Statements now apply proper client permissions when viewing details.
Accounting	Enhancement	Added the ability to create a batch of client accounting statements from the Customer Balance Summary report in the End of Period Processing and Reporting site.
Accounting	Bug	Fixed an issue that would cause errors when exporting to QuickBooks.
Agency Setup	Enhancement	A success modal will now display on creation of a new (non-tracking) user displaying the Agency Id, Initials and Password. Users will be able to copy this information to easily provide to the new user.
Data Replace	Enhancement	Added the ability to data replace the Annualized Premium checkbox.
Downloads	Enhancement	You can now view and set Client Producer and Client CSR when creating a new policy on an existing client from Unmatched Downloads.
Downloads	Enhancement	When applying offices to a download task rule, there is now an option to select/deselect all offices, and to select or search for specific offices. This makes it easier to configure rules for agencies with a long list of offices.
Logs	New Feature	Added ability to print a list of logs on a client.
Submissions	Enhancement	Made various enhancements to Submissions: corrected some display issues, enhanced readability, and modified required fields.
Email	Enhancement	The "From" line on the HawkSoft Email Editor is now available for users that are sending Email or Batch Email with the SMTP setting.
Email	Bug	Fixed issue causing some attachments in Emails to not show up in the HawkSoft Email Viewer.