

HAWKSOFT 6 RELEASE NOTES

Released 01/30/2025

Category	Type	Release Notes
Accounting	Bug	Fixed an issue that would cause the wrong account to be referenced when exporting items to QuickBooks if different accounts (at different levels, like parent and child) had the same name.
Agency Setup	Enhancement	Restriction on User List removed; users can now scroll to view all agency users from User Setup.
Client Viewer	New Feature	Added a place to enter and view Notes at the Policy level.
Commissions	Enhancement	Updated the Commission Transaction Types to be consistent with downloads.
Commissions	Bug	Resolved an issue where some "Cancellation" transaction types were not being displayed in commission workflows.
Email	Enhancement	Added support for Dragging part of a Conversation Email from MS 365.
Logs	Bug	Fixed an issue preventing printing of linked logs from working.
Reporting	Enhancement	When double-clicking on a log note in an Activity Report, the report now launches the selected log note rather than the Logs tab, making it faster to view the full log note.
Reporting	Enhancement	When running an Activity Report, there is now an option to include log note appends in the report, for agencies who wish to report on updates made to logs.
Reporting	Bug	Filtering by the Created Date column on an Activity Report now excludes the "Before Date", and the "After Date" date filter type. Similarly, "Date Range" now correctly includes the bounds of the date range.
Submissions	Bug	Corrected an issue that could cause changes to a submission to revert back to old data.
ACORD Forms	Bug	Corrected an issue that prevented the ACORD 823 from properly generating when needed with the ACORD 125 and removed the location picker from the workflow.

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ACORD Forms	Bug	Corrected an issue that could cause some ACORD forms to not launch if there were multiple homes or buildings with no coverages on a location.
Data Importer	Bug	Data Importer updated to allow import of Client without a policy if no policy fields are mapped.
Attachments	Bug	Corrected an issue that could allow a user to open a working doc for edit that is already checked out.
Email	Bug	Fixed issue causing problems with sending Text messages through Message Media after Classic Outlook is disabled in favor of New Outlook.
Action Menu	Enhancement	Users printing state specific auto ID cards will now be able to manage which address prints on the card during the workflow.
ACORD Forms	Bug	Corrected an issue with migrated Forms that could cause them to have unintended behaviors.
CMS	Bug	Corrected a typo in the Occupancy Type dropdown for Home Underwriting.
Attachments	Bug	Resolved a bug which resulted in the wrong effective date when manually attaching policies via Paste as Attachment.