

HAWKSOFT 6 RELEASE NOTES

Released 02/06/2025

Category	Type	Release Notes
Accounting	Enhancement	Added a link to the list of batch accounting statement jobs when viewing a client balance summary report.
Client Viewer	Enhancement	Policy Notes are now included when a policy is moved or copied to another client.
Client Viewer		Corrected an issue that could cause Underwriter changes not to display in the UI.
Commissions	Enhancement	Added the ability to export Commission workflows and reports to a CSV file.
Commissions	Enhancement	Updated how the Agent Paid Statements are sorted by default, so that it is now based on the agent. Also added the ability to sort manually by the Agent, Total Agent Commission Paid or Total Commission Transactions for each statement.
Search	Enhancement	Client search updated to allow specifying search of name field as "Starts with" or "Contains".
Search	Enhancement	Client Search provides option to 'Load More' results if the search returns the maximum search results limit (50) for each of the individual search types.
CMS	Enhancement	Added a checkbox to the warning that appears when a user has more than 10 client tabs open at once to not show that warning anymore.
Correspondence	Bug	Resolved a bug with accented characters in E-Signature Template subject lines.
Attachments	Bug	Corrected an issue that could cause Working Documents to become inaccessible to users outside of a US time zone.
Data Importer	Bug	Fixed issue with mapping a fixed value to the Client Office field in Data Importer.
Integrations	Bug	Fixed issue causing the DOB to be missing from the Insured Information section for the First Named Insured on AL3 exports.
Search	Enhancement	Personal Profile preferred name is now displayed in parenthesis next to the person's legal name.