

HAWKSOFT 6 RELEASE NOTES

Released 03/13/2025

Category	Type	Release Notes
Accounting	Enhancement	Enhancements have been made to trust accounting reports to improve ease of use, including improving the filtering functionality and allowing selection of multiple rows using Shift+Click.
Accounting	Bug	Fixed an issue that would cause Direct Bill Disbursement payee to be blank, thus not being able to be exported to QuickBooks.
Agency Setup	Enhancement	Added ability to toggle a Tracking Only user between Active and Inactive states. Active Tracking users will be available in the user dropdowns in HS 6 desktop (CSR, Producer, Agent 1,2,3).
Agency Setup	Enhancement	We have added support for a Carrier specific setting to use HawkLink for Microsoft Edge.
Agency Setup	Enhancement	Added the ability to convert a Tracking Only user to a normal user.
Agency Setup	Enhancement	Added the Additional/Other Interest/Certificate Holder Database Agency Setup permission to the "CSR/Producer" user template. Added the Allow Creating/Editing Commission Transactions Commission permission to the "Bookkeeper" and "Manager" user permission templates.
Agency Setup	Bug	In Agency Setup > Offices, we fixed an issue where the Description field did not save upper/lower case properly.
Commissions	Enhancement	Added the ability to add a commission paid amount when creating a new Commission Statement.
Downloads	Enhancement	The Contract and Producer Sub-Code from the AL3 is now visible in the Downloads Unmatched Search, as well as the policy Office in the Search Results.
Logs	Bug	Fixed an issue with the Action menu > log workflow that would sometimes cause the time of the log to be saved incorrectly.

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Submissions	Enhancement	Submissions users will now have a way to view the corresponding submission group log from the submission view drawer.
Tasks	Enhancement	A new "Customize View" button in Agency Tasks allows each user to customize their own view and task date ranges. The number of days shown in the Due, Created, or Done columns can be changed. A column can be added for a custom date range of up to 30 days.
Inbox	Enhancement	Added ability to create new Clients and/or Policies when processing Virtual Prints, HawkLink Snapshots, or scanned items in the Unmatched Documents Inbox.
Proposals	Bug	Corrected an issue that would cause the proposal name to reset to today's date if a user clicked anywhere else in the UI.
Search	Enhancement	The Last, First / Business name search field has been updated to always do a "Contains" search against Business name. Users will still have the option to do a "Starts With" or "Contains" search for Last , First name searches with the default being "Start With".
Action Menu	Enhancement	When editing or closing a Task, users are now able to also insert new policies, or perform other actions like Remarket or Archive. As soon as another action is performed (like printing an ACORD form) these options are disabled.
Certificates	Bug	Corrected an issue that caused the wrong documents to be selected when using the Select By function in the certificate wizard.
Email	Bug	Fixed issue causing HawkSoft to crash after forwarding or replying to emails with long subject lines.