

HAWKSOFT 6 RELEASE NOTES

Released 03/27/2025

| Category | Type | Release Notes |
|--------------|-------------|---|
| Accounting | Enhancement | When creating a Client Statement, a new option for "Open Items" has been added. This Statement will include all open invoices and unapplied credit memos or payments. |
| Agency Setup | Enhancement | Added ability to copy Term when copying settings from one carrier to another or creating a new carrier. |
| Agency Setup | Bug | Resolved issue with Carrier Name updates and Carrier Merge updates not reflecting in newly generated reports. |
| Downloads | Enhancement | Added additional matching logic to improve the match rate for Progressive eDocs. |
| Reporting | Enhancement | The new Line of Business Policy report in Quick Reports allows agencies to run a policy report for clients that have or are missing specific LOBs and then summarize based on policy fields like Carrier. |
| Reporting | Bug | 'No Active Auto' report from Sales & Retention KPI no longer includes Auto policies in "Renewal" status. |
| Submissions | Bug | Addressed an issue with migrated Submission groups that would cause some users to be unable to edit with right click, and others to be unable to modify the date field. |
| Tasks | Enhancement | Users can now create log notes directly from the Task Center when editing or closing Tasks. |
| ACORD Forms | Bug | Users will now have a confirmation dialog appear when they uncheck a document in a cert holder's documents to print if that document has been removed from the certificate document library. Confirming will remove the document from the print list. |
| Email | Bug | Fixed issue causing crashes and failed Batch Email when using a template that merges the AI List. |