

HAWKSOFT 6 RELEASE NOTES

Released 04/24/2025

Category	Type	Release Notes
Accounting	Bug	Fixed an issue that would cause a client accounting balance to become broken sometimes when merging clients and then unarchiving the source client.
Activity Tags	Enhancement	When searching log text, you will now be able to select to filter the log list by Activity Tags.
Agency Setup	Enhancement	Added ability to use User Template to apply permissions when converting Tracking user to Normal user.
Client Subsystem	Enhancement	If a client merge results in two policies having the same policy number, the policy from the source client will be in DeadFile status on the newly created target client.
Client Viewer	Bug	Fixed an issue where the save options would not show up sometimes when selecting to edit a task on the client from the task center.
Commissions	Enhancement	Updated the logic used for calculating the term on commission transactions to more accurately calculate renewal commissions.
Commissions	Enhancement	Added the ability to add the Total Agency Commission, Transaction Count, and Last Reconciled Date to all policy-based reports.
Downloads	Enhancement	If a Business Auto Download contains an excluded Driver, we now place the word "Excluded" in the Driver License field.
Downloads	Bug	Added Contract/Producer Sub-Code to the "View All Policies" accessed from a Recommended Match.
Downloads	Bug	Fixed issue causing some Cancellations to remove the premium from the policy.
Reporting	Enhancement	Launching a client from a report will now keep the row highlighted, giving you a bookmark of where you left off in the report.
Tasks	Enhancement	When closing a task, the task information (including the task title, category, creator, and assignees) are now added to the associated log

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		note. This makes it more clear which task was closed without making extra clicks.
Tasks	Enhancement	Users with permission can now close multiple tasks in the My Tasks list at once, by selecting the checkmark to the left of each task and using the Close Tasks button. Users may add text to be appended to the log notes associated with the selected tasks.
Tasks	Bug	Updated error message text on agency tasks and corrected an error for a new agency accessing agency tasks for the first time (when no tasks had been created yet).
CMS	Enhancement	Hawksoft will now verify all files are installed and log all installation steps when Hawksoft is installed or updated.
ACORD Forms	Bug	Corrected an issue that was causing documents printed with a COI to print out of the order they appear.
ACORD Forms	Bug	Fixed issue causing Address Lines for the Additional Interest on Binders to sometimes be repeated.