

Import & Export Features in HawkSoft

See what information you can import and export with different HawkSoft features, and which file formats they accept.

Feature	Description	Import	Export	File Format
HawkSoft Importer	Import new client files, add new policies to existing client files, or update existing policies from a third party source, like a CRM.	✓		ACORD XML AL3 CMSMTF (Tagged File Format)
Data Importer	Creates new client files (does not update existing files) from an imported spreadsheet or database file using a template and configuration file to map fields. Good for importing leads or merging multiple HawkSoft databases.	✓		Spreadsheet CMSMTF (Tagged File Format)
Lead Capture from Website	Automatically import lead capture forms from your website into HawkSoft.	✓		CMSMTF (Tagged File Format)
Commission Statements	Import commission statements from carriers in spreadsheet format and convert into downloaded statements with fields automatically mapped to HawkSoft's accounting system.	✓		CSV XLS XLXS
Drivers & Vehicles	Bulk import or update driver & vehicle info easily for large commercial fleets.	✓	✓	CSV template
Scheduled & Unscheduled Items	Bulk import or update scheduled & unscheduled items on commercial policies, like agricultural property.	✓	✓	CSV template
Certificate Holders	Bulk import or update the list of cert holders on a Certificate of Liability for insureds who have many cert holders, like contractors.	✓	✓	CSV template