Enabling HawkSoft's Agent Portal

A guide to help agencies access their client and policy data

Overview

The purpose of this document is to walk you through enabling Agent Portal for your agency. To perform the following steps, you will need:

- To be a main contact for your agency's HawkSoft account (noted in the email that linked to this document).
- To know your Agency ID (also called HawkSoft Contract ID, and provided in the email that linked to this document).
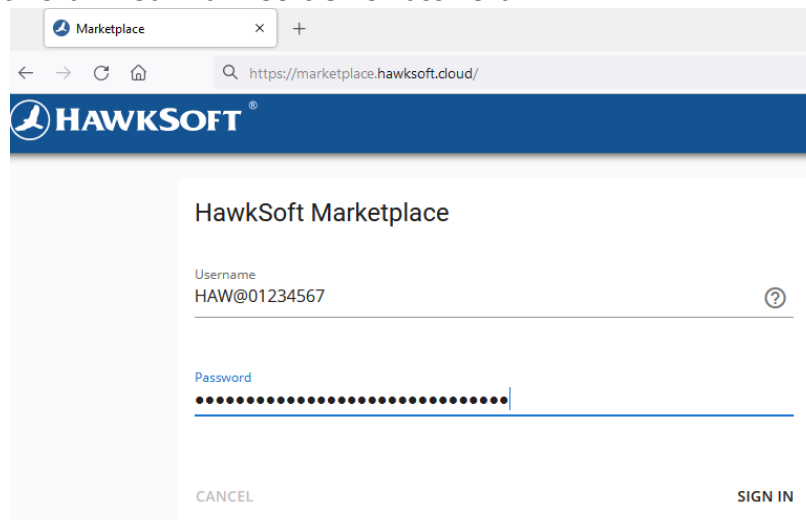
What is Agent Portal?

Agent Portal is a web-based component of HawkSoft. It allows any user within your organization to login to a secure portal and view Client and Policy information. *Log notes are not currently available in Agent Portal, but all other key client contact information and policy information is.*
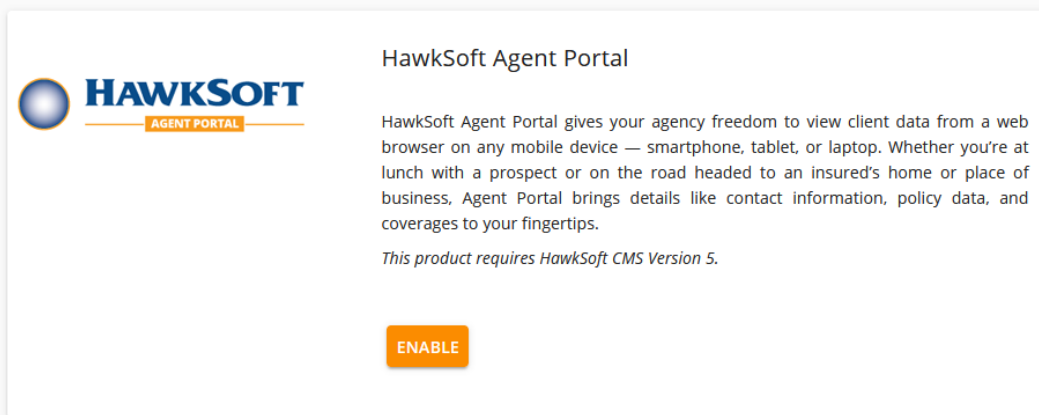
[Learn more about Agent Portal here](#).

Enabling Agent Portal

1. Go to https://marketplace.hawksoft.cloud in a web browser.
2. Log in using the following information:
    a. Username = **HawkSoft CMS User Initials @ Agency ID**
       EXAMPLE: HAW@999999999 or KAH@1337
    b. Password = **Your HawkSoft CMS Password**

3. If you are not currently registered to use Marketplace, follow the prompts to complete registration ([Help Article here](#)).
    a. Registration must be completed by a main contact of the agency.

4. In HawkSoft Marketplace, locate the listing for "HawkSoft Agent Portal"

5. Click "Enable"
6. Review the following page and click "Subscribe"

Agent Portal will now be accessible for you and your agency staff.

[Use this Help Article to learn more about how Agent Portal works](#)