

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).

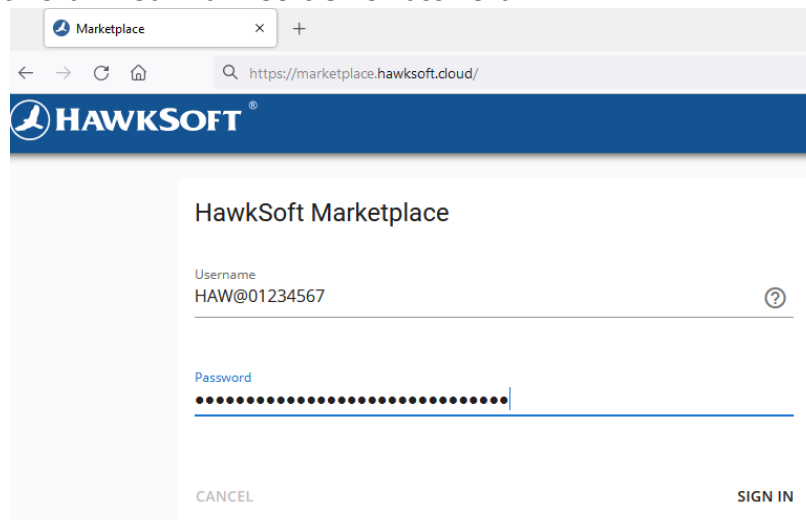
What is Agent Portal?

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.](#)

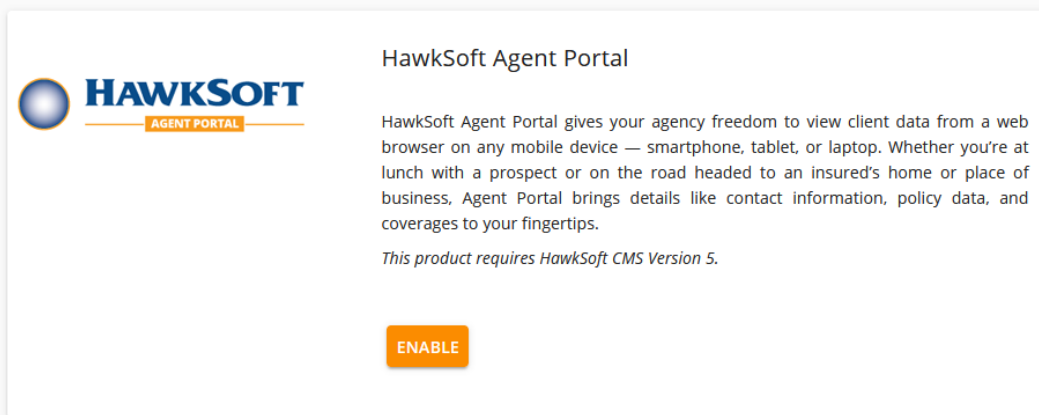
Enabling Agent Portal

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@9999999999 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”



The screenshot shows a product listing for "HawkSoft Agent Portal". On the left is the HawkSoft logo with "AGENT PORTAL" written below it. To the right, the title "HawkSoft Agent Portal" is displayed. Below the title is a paragraph of text: "HawkSoft Agent Portal gives your agency freedom to view client data from a web browser on any mobile device — smartphone, tablet, or laptop. Whether you're at lunch with a prospect or on the road headed to an insured's home or place of business, Agent Portal brings details like contact information, policy data, and coverages to your fingertips." Below this text is a note: "This product requires HawkSoft CMS Version 5." At the bottom center of the listing is an orange button labeled "ENABLE".

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

HawkSoft Agent Portal

HawkSoft Agent Portal gives your agency freedom to view client data from a web browser on any mobile device — smartphone, tablet, or laptop. Whether you're at lunch with a prospect or on the road headed to an insured's home or place of business, Agent Portal brings details like contact information, policy data, and coverages to your fingertips.

You control which employees have access to client data outside the office. Agency managers can set permissions conveniently located in the HawkSoft User List.

Your agency is currently **Unsubscribed** to the **HawkSoft Agent Portal** product.

Enable HawkSoft Agent Portal today, and log in at <https://agent.hawksoft.cloud> using your HawkSoft CMS credentials.

SUBSCRIBE

Agent Portal is intended for use by your agency's licensed Seats to HawkSoft CMS

RETURN TO MARKETPLACE

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

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