

# PRODUCT FEATURES

Most Efficient Interface in the Industry



HawkSoft's agency management system delivers the most value for your investment. Industry-leading workflows, designed by agents for agents, can significantly impact your bottom line and staff productivity. Agencies that use our system have seen dramatic improvements in employee productivity, efficiency, sales and retention, and workplace happiness and organization.

## Hallmark Features Unique to HawkSoft

### Agency Intelligence™ Reporting Suite

One-click reports for Book of Business, retention, sales pipeline, and cross-sell metrics in one place. Available at no extra cost.

### Auto-Documenting System

Proprietary Action Menu that automatically builds a documentation trail for every client interaction as part of every workflow.

### HawkLink

Integration with carrier websites lets you quickly process changes, payments, and quotes. Auto-fill fields on websites with data from HawkSoft.

### Virtual Printer

PDF writer tool captures any website image, screenshot, or document and attaches it directly into the policyholder's file. Eliminates printing and scanning by turning anything you can print into a PDF.

### All client data in 4 clicks or less!

Access policies, docs, accounting, log notes, and contact info within 4 clicks or less. Get a complete picture of your clients without jumping through endless screens.

**HawkSoft has the most efficient interface in the industry!**  
**Put us to the test on your demo of HawkSoft.**

“ We use HawkSoft for everything — communication, documentation, email, managing client files, and claims. We love all the features, especially the Action Menu that automatically self-documents every client interaction. We couldn't do all of this with our previous vendor without using other programs to get the job done. ”

*Barbara Winton  
Eversure Insurance*

### **Batch and Email Marketing**

Easily schedule and send emails to lists generated from our reporting suite. Market to your whole book of business or specific audiences with targeted messages.

### **Email and Form Letters**

Easy to edit and create email letters. Create, categorize, and use templates to expedite common communications.

### **Actionable Sales Pipeline Reports**

Not just a report; interact with the data to drill-down on opportunities.

### **Website Lead Capture**

Capture leads from your website by using web forms to import data into HawkSoft.

### **Sales Proposals**

Fully editable and customizable sales proposals lets your agency stand out.

### **Carrier Downloads**

While most agency management systems support this, the real question is how much data is downloaded and which LOBs are supported? HawkSoft stands apart from other systems by letting agents choose whether or not carrier downloads automatically update the policy at the same time download occurs. Many agents prefer to review policy changes before overwriting the old policy.

### **Document Management**

Documents are stored in HawkSoft at the policy level. Drag-and-drop from your desktop.

### **Commission Reporting**

Import commission statements from carrier downloads or Excel/CSV files.

### **Accounting + QuickBooks Integration**

Integrate with the #1 accounting system. Deep integration without duplicate entries.

### **Text Messaging**

Sent texts are automatically documented in HawkSoft. Replies to texts come directly to your email inbox.

### **ACORD Forms**

Built-in ACORD Form library intelligently prefills data from HawkSoft. Library is automatically updated with current versions of P&C ACORD Forms.



**HAWKSOFT**

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