

# Client Management System

*The Best Customer Service in the Industry  
—Just Ask Our Customers*

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- Carrier Downloads:  
Commercial Lines,  
Personal Lines and Direct  
Bill Commissions
  - Real Time Inquiries and  
Quoting via HawkLink
  - Integration with Your  
Agency's Website
  - Integration with  
Comparative Raters
  - Sales Proposal System
  - Mass Emailing Capability
  - Drag and Drop Any  
Electronic File Directly Into  
Client File
  - High-Speed Scanning and  
Document Management
  - QuickBooks Integration
  - ACORD Forms
  - Data Conversions From Most  
Management Systems
  - Management and  
Marketing Report
  - Pricing structure to fit your  
agency size and needs
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## Agency Management Software

Your client information is your most valuable asset. Keeping your client information up to date and having instant access to that information is essential to your success. HawkSoft Client Management System has been designed by insurance agents with your success as our goal.

## Why HawkSoft?

- Unlimited access to the industry's best live customer support
- Nationally recognized leader in software technology for independent insurance agencies
- Seamless integration with third-party tools and systems agents use most
- Experience, tools and staff to help you effectively Manage Your Paper, Your Customers and Your Agency!

## Manage Your Paper

- Go Paper Free. Print from any website or program directly back to customer file
- Access scanned documents and digital photos for any customer file on every computer
- Carrier Downloads. Let your carriers keep your customer files up to date so you don't have to
- E-Mail change requests from your client file
- Single Entry. Transfer information between HawkSoft CMS, comparative raters and QuickBooks

## Manage Your Customers

- Service customers faster and more accurately with complete information available on every desktop
- Access Carrier Websites from within a customer file giving you access to complete policy information
- Manage your book of business with Cross Selling Reports, Production Reports, Cancellation Reports, Book of Business Reports and much, much more
- Print insurance ID cards, ACORD forms, Certificates of Insurance, memos, letters, proposals, receipts, envelopes & more with pre-filled client information
- Easy to Use! HawkSoft CMS uses event driven menus to make changes quick & easy

## Manage Your Agency

- Commission Reconciliation and agent commission reporting
- Track Broker Fees, Promissory Notes, and Invoices
- Integrates with QuickBooks for a complete accounting package
- Activity Reports show you transactions by user
- Network single or multiple offices

## Free Demo!

Call us today for a free demonstration of the HawkSoft CMS Software, or receive a free trial version of the software. Don't take our word for it, try HawkSoft CMS for yourself and see it change the way you do business. Call HawkSoft at (866) 884-4680.

HawkSoft provides independent insurance agencies and their carriers with products and tools to help make them more efficient and profitable organizations. Using the Single-Entry Multi-Company interface (SEMCI) concept, HawkSoft has developed the most efficient tool for the independent insurance agent to manage their clients and their business.

"HawkSoft is easy to learn and use. You can scan directly to your client's record and drag and drop documents, faxes and emails. This allows offices to go paperless and gives your clients faster and better customer service since everything you need is at your fingertips. HawkSoft staff has always been very friendly and extremely helpful! EVERY agent should own HawkSoft CMS!"  
- Debby R., Katy, TX

"HawkSoft has been fantastic! No other system is as easy to use and train others on. The integration with our rater and website make it worth every penny. Thank you for the great service!"  
- David B., Rexburg, ID

The screenshot displays the HawkSoft Client Management System interface for a client named 'MARYLAND MERC'. The interface includes a menu bar, a toolbar, and a main content area with several sections:

- Client Information:** Company: MARYLAND MERC, Contact 1: Anderson, Sam, Contact 2: Lastname, Jeromie (Jerry), Address: 12009 FRANKLIN ST, BELTSVILLE, MD 20705.
- Policy Details:** Client Type: Customer (Commercial), Status: Active, Producer: PGH, Office: Main Office, Work Phone: (800)989-9999, Fax: (800)987-9878.
- Policy Information:** Program: Preferred, Policy # 01CG74312710, Status: Renewal, Effect Date: 10/12/2010, Expir. Date: 10/12/2011.
- Activity Log:** A table listing various actions and events, such as 'Int Correction Veh', 'Int Correction Coverages PROP Forms', and 'Phone From Ins Print Certificate of Liability (025) Log'.
- Calendar:** A calendar view for September 2011, showing dates from Sunday to Saturday.
- Calendar Events:** A list of events, including 'Today - 09/08/2011' and 'Tomorrow - 09/09/2011'.
- Suspenses:** A list of suspenses, including '09/22/2010: Monster, Mig...' and '03/01/2010: Monster, Mig...'.



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