



# Reporting in HawkSoft

Agency Management System

Adapted from HawkSoft help articles, "Running a New Report Using Report Generator" and "Commonly Used Reports"

*The information contained within is accurate as of 02/13/2015 for version 3.14 of the HawkSoft CMS program. For the most up-to-date workflows please access Help in HawkSoft CMS.*

Need help? Contact HawkSoft Support

866-884-4680 Option 3

[support@hawksoft.com](mailto:support@hawksoft.com)

# The basics of Report Generator

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## Overview

The HawkSoft Report Generator enables you to run reports that include any combination of client, policy, claims, and marketing information from data stored in HawkSoft client files.

Using the Report Generator, you can:

- Create and store customized reports
- Filter and summarize the resulting data
- Use generated reports as the basis for batch emails and form letters

Reports are typically created by an Owner/Administrator or Manager, however, HawkSoft provides the ability to allow limited access to any user whose job responsibilities include this task.

**Example:** An agency owner may allow access to the Report Generator but can limit a user's ability to print, export, and/or save report data.

## Permissions

The following Permissions are required to perform the actions described in this document. The Owner/Administrator or Manager of the agency should be familiar with how to access User Permissions.

Using Report Generator:

### Reports

- Report Generator
  - Create New Reports
  - Run Memorized Reports

Saving and exporting the results:

### Reports

- Allow Printing, Saving, and Exporting of Report Data

## Accessing Report Generator

In HawkSoft, select **Reports > Report Generator**. A new window will open revealing Report Generator.

Using Report Generator starts with one of three options:

1. **“Create a New Report”**: This will start the entire process from scratch, offering full customization.

2. **“Run a Memorized Report”**: Use previously *memorized* report criteria to efficiently produce routine or frequently needed reports. HawkSoft comes pre-loaded with the most commonly needed reports, which are stored in this option.
3. **“Open a Saved Report”**: Open saved results from past reports.

This How-To guide will walk you through using **Create a New Report** to illustrate two types of reports beneficial to carrier representatives. From an exhaustive explanation of the ins-and-outs of Report Generator, please see the following HawkSoft Help articles:

- [Running a New Report Using Report Generator](#)
- [Report Generator Memorized Reports](#)
- [Working with Report Generator Data](#)
- [Commonly Used Reports](#)

## Tips

### ★ **Less is more.**

*The fewer **Report Filters** used at the outset, the more data you will have to work with. It is much easier to see the desired results if you can trim away unnecessary content. Too many **Report Filters** upfront may automatically exclude portions of the data you’re looking for.*

### ★ **Report generator is (currently) a snapshot of what is, not what was.**

*Report Generator will show you information that is currently in the HawkSoft agency management system. That is, if you run a report on Tuesday it will show you information that exists on Tuesday. Report Generator cannot show you information that existed on Monday but we overwritten since.*

### ★ **HawkSoft Support is here to help.**

*If you’re working with an agent and can’t quite get the results you’re after, call 866-884-4680 and use Option 3. HawkSoft’s customer support team is the best in the industry and love to work with Report Generator.*

# Active Client List by Carrier

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One of the most common reports produced in Report Generator is the “Current Active Clients Report.” In fact, this is a Memorized Report packaged with HawkSoft and as a shortcut you can find “Current Active Client Report” under Memorized Reports allowing you hit **Next** until you reach Step 8.

**Scenario:** You would like to see all of the active clients an agency has that have policies with your carrier.

**Solution:** Run a Current Active Clients report and Summarize by Carrier.

1. Access Report Generator via **Reports > Report Generator** from the main HawkSoft window.
2. Select **New Report** under **Create a New Report**.
3. Leave the default setting for **Policy Types**.
4. Under **Report By**, select **Client (At least one policy must match criteria)**
5. Click **Next**.
6. These are the **Report Generator Filters** options. In **Filter 1**, select **Policy Filter: Status** on the left and check **All Active** when the options appear on the right.
7. Click **Next**, and **Next** again. In Report Generator, we always recommend *starting* with the fewest number of filters possible. We can summarize the report for more granularity. If we start that way, you may miss data.
8. These are the **Report Layout** options. This screen controls what data is presented in the report. From the **Report Layout** drop down menu, we recommend using **New Business Report Layout**. Under **Report Fields** all of the data fields for the report are listed. You can click **Add/Remove** to add more fields or take away unnecessary ones. For this scenario, you must include “Company” as a Report Field.
9. Click **Finish** and Report Generator will start processing the report.
10. Click **Summary** at the top of Report Generator. This feature allows you to hone in on specific criteria.
11. In the **Create Summary** window that appears, select **Summary by: Company** and click **OK**.
12. A summary of the report results will appear listing **Company**. If you one need to select one entry on the list, double-click it. If you need to select multiple entries, hold **Ctrl** and click on each desired company. Once they are all selected, **right-click** on a selected entry and click **New Report**.
13. You now have a report of all active clients for a specific carrier. From here, you can:
  - a. Work the report. Double-click on any entry to quickly access their client file.
  - b. Print the results by adjusting the column layout and clicking **Print**.
  - c. Save the results by clicking **Save**. You can then pull up this specific report at a later time.
  - d. Export the results to a CSV file for use in marketing. Select **File > Export > Reports...** and when prompted change the file type to **Comma Delimited Files (.csv)**.
  - e. Apply notes en mass via **Create batch log...** ([Read more here](#))
  - f. Send out a form letters or an email campaign. (For **Form Letters**, [read more here](#). For **Batch Email**, [read more here](#).)

# Account Rounding / Cross Sell Reports

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Report Generator can also be used for reporting about specific policies. This is a powerful feature when harnessed for Account Rounding (which HawkSoft tends to call **Cross Sell** reports).

**Scenario:** You would like to know what cross sell opportunities exist from your carrier's customers at an agency. Who has a Home policy, but not an Auto? Who has an Auto policy, but not a Home?

**Solution:** Run a Cross Sell report *filtering for* your customers.

1. Access Report Generator via **Reports > Report Generator** from the main HawkSoft window.
2. Select **New Report** under **Create a New Report**.
3. Check the box for **Does NOT have Active Policy**. This will immediately change the dialogue box to the left. It now reads **Has Policy**.
4. In the **Has Policy** box, select the type of policy these clients do have. (If you're after "Home but no Auto," select Home).
5. In the **Does NOT have Active Policy** box, select the type of policy you hope to cross sell. (If you're after "Home but no Auto," select Auto).
6. Click **Next**.
7. On the **Report Generator Filter** page, set **Filter 1** to **Policy Filter: Company**. In the right dialogue box, a list of all companies in the agency's HawkSoft system will populate. Select the desired companies.
8. Click **Next**, and **Next** again.
9. On the **Report Layout** page, we recommend selecting **Customer Report Layout** from the **Report Layout** drop down menu. It provides the necessary contact information for the customer. Under **Report Fields** all of the data fields for the report are listed. You can click **Add/Remove** to add more fields or take away unnecessary ones.
10. Click **Finish** and the Report Generator will start processing the report.
11. You now have a report of all clients *with* a specific policy type but *without* another. From here, you can:
  - a. Work the report. Double-click on any entry to quickly access their client file.
  - b. Print the results by adjusting the column layout and clicking **Print**.
  - c. Save the results by clicking **Save**. You can then pull up this specific report at a later time.
  - d. Export the results to a CSV file for use in marketing. Select **File > Export > Reports...** and when prompted change the file type to **Comma Delimited Files (.csv)**.
  - e. Apply notes en mass via **Create batch log...** ([Read more here](#))
  - f. Send out a form letters or an email campaign. (For **Form Letters**, [read more here](#). For **Batch Email**, [read more here](#).)