HAWKSOFT®

AGENCY MANAGEMENT SYSTEM

HawkSoft
CLOUD

*All the features agencies love about HawkSoft,
on a new cloud-powered platform*

BENEFITS
of HawkSoft Cloud

HawkSoft's new cloud platform combines the powerful performance and efficiency of our desktop app with the convenience of cloud-based data that can be accessed from anywhere, on any device. You'll enjoy comprehensive functionality on your office PC or laptop, and have access to important features on the go via browser login.

- Accessible anywhere with internet
- World-class data security
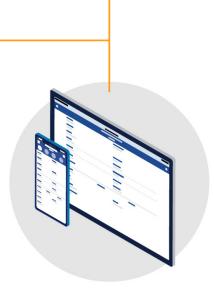- Automatic data backup & retention
- Export your data on demand
- Easy scalability for agencies of all sizes
- Unlimited online file storage

Cloud data

Desktop app
All features

Mobile browser experience
Many features

Insurance Platform FEATURES

The [HawkSoft Insurance Platform](#) provides all core management system features at one price, with a robust ecosystem of add-ons, integrations, and services that help your agency scale as you grow. Get more value for your money with HawkSoft.

POLICY MANAGEMENT

- Efficient, intuitive PL & CL workflows
- Task management
- Carrier downloads & ACORD Form prefill
- Automatic documentation
- Virtual Printer (PDF Writer)
- Mobile-friendly Agent Portal
- Quoting & carrier connectivity (HawkLink)
- E-Signature solution

SALES & MARKETING

- Website lead capture
- Sales pipeline functionality
- Sales proposals & submission tracking
- Rating tools and integrations
- Uprate alerts
- Batch email & texting
- API integrations for sales and marketing automation

REPORTING & ANALYTICS

- KPI dashboards & custom reports
- Commission import, reconciliation, & payouts
- Trust Accounting workflows & QuickBooks integration
- Managed Accounting Services
- API integrations for digital payments

API INTEGRATIONS

- Marketing & sales automation
- Online review management
- VoIP & business communication
- Mobile service app for insureds
- Carrier connectivity
- Data analytics & business intelligence
- Accounting & digital payments
- Website design & management

New & Enhanced FEATURES

The HawkSoft 6 cloud platform has the same core capabilities as previous versions, plus a number of new and enhanced features that boost agency efficiency. Hear what agents are saying about HawkSoft Cloud!

Task Center

Effortlessly manage user and agency tasks, view open tasks on a client, and create templates for common agency tasks.

Activity Tags

Easily tag, view, and report on all the topics discussed or activities completed in client interactions.

Quick Reports

Flexible, user-friendly reporting from preset options that can be customized and filtered. Quickly create and share reports or make templates to run on a recurring basis.

Download Center

Manage Ivans and 3rd-party downloads in one dashboard, with downloads retrieved continuously 24/7. Quick analytics, hassle-free matching, and robust download rules.

Trust Accounting

Enhanced QuickBooks integration, streamlined workflows, and an updated transaction list on the client make trust accounting easier than ever.

Commission Workflows & Reports

Easily track and manage commission statements from downloads, import, or manual entry. Reconciliation and agent payout made simple.

Mobile-friendly Agent Portal

View client and policy data via mobile browser login, and add log notes and attachments to clients while on the go.

See HawkSoft Cloud in action

Schedule a demo

hawksoft.com

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