New Agent Hawksoft Training Guide

The following resources will help you with your daily front-line tasks, such as assisting prospects and insureds, providing proof of insurance cards and other forms, documenting policy changes, and more. Additional resources are included at the end of this guide to provide you with supplemental education, as well as ongoing continuing education.

The HawkSoft team is here to support you through this process. If you get stuck along the way, reach out to our support team!

Objectives & Course Description

By completing this course, you will understand how to navigate the HawkSoft CMS program, use the Action Menu, and manage policies for downloading and non-downloading carriers.

You will learn how to retrieve customers, interpret the Client/Policy file, initiate client/policy changes, create ACORD forms and client correspondence, and document communications with your customers.

Set Required Permissions - This is set up by Pacific Crest

In order to complete your tasks, certain user permissions are required.

This task is already completed by Pacific Crest - reach out with questions!

1. Click the **Settings** icon, and then select **User List**.

   The **User List** dialog opens.
2. Select the CSR, and then click **Edit**.

   The **User Profile** dialog for the CSR opens.
3. Select the **User Permissions** tab, and then select the required permissions.

   You can select CSR permissions based off CSR/Producer Settings in Default User Templates, and then modify as needed.

Information on setting user permissions is included in the User List Introduction video.

Watch the following videos and read the following articles:

Navigating HawkSoft CMS

	Training Videos		Training Guides
☐	Getting Started	☐	Tour of the CMS Start Page
☐	Retrieving Customers	☐	Toolbar Icons
☐	The Client File	☐	Searching for a Client
☐	Client Policies	☐	Tour of the Client File
		☐	Client/Policy Information Screens

Basic Client Service Tasks

	Training Videos		Training Guides
☐	The Action Menu	☐	Making Changes to a Client File
☐	Documenting a Phone Call	☐	Making Changes to a Policy
☐	Printing or Emailing a Document	☐	Converting a Policy Type
☐	Log Notes (Fundamental)	☐	Invalid Client Policy Data
☐	Adding Attachments	☐	Dragging and Dropping Documents
☐	Making a Change to a Policy	☐	HawkSoft Uploader
☐	Processing an Endorsement	☐	ACORD Forms Overview - all sections

	Training Videos		Training Guides
☐	Renewing a Policy		
☐	Cancelling a Policy		
☐	Reinstating a Policy		
☐	Log Notes (Intermediate)		
☐	Sending a Form Letter		
☐	Sending an Email		
☐	Certificates of Liability		

Tools for Efficiency

	Training Videos		Training Guides
☐	Introduction to Suspenses	☐	HawkLink Browser (BETA)
☐	Suspense List	☐	Comparative Raters Overview – read the section that applies to your agency's rater
☐	HawkLink Toolbar		
☐	My Documents for Review		

Additional Resources

HawkSoft Training Guides

Training Guides cover everything from configuring and customizing CMS to using the software to help you manage daily tasks. To access the Training Guides from HawkSoft CMS, click on **Help** > **Training Guides**.

Product Support Contact Options

- Chat Support:
  - Open a web browser on your local desktop > Browse to *https://www.hawksoft.com*, and then select **Support** > **Contact Support** > Click **Live Chat**
- Email: support@hawksoft.com
- Phone: (866)884-4680, Option #3
- Hours: 5:30 am to 5:00 pm, Pacific Time, Monday through Friday (excluding holidays)