



Empowering Agents

Client Management System

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

- Carrier Downloads:
Commercial Lines,
Personal Lines and Direct
Bill Commissions
- Real Time Inquiries and
Quoting via HawkLink or
Transformation Station
- 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

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 client's contact information includes Anderson, Sam and Lastname, Jerome (Jerry). The client type is Commercial, and the status is Active. The address is 12009 FRANKLIN ST, BELTSVILLE, MD 20705. The phone number is (800)888-9999 and the fax is (800)987-9878.

The interface shows various tabs for managing the client, including Work Comp, CPKG, PROP, CGL, INMRC, CRIM, and 1-Comm Aut. The current view is for the CPKG (Preferred) policy type. The policy details include:

- Company: Western Reserve
- Program: Preferred
- Agent Code: 43344
- Agent 1: JRP
- Policy #: 01CG74312710
- Acc #
- Status: Renewal
- Effect Date: 10/12/2010
- Exp. Date: 10/12/2011
- Status Date: 10/12/2010
- Policy Type: ACORD Type CPKGE
- Days Lapsed: Term 12 Months
- BI Type
- Quoted Prem: 0.00
- Current Rate: 26,292.00
- Source: Cross Sell

Below the policy details is a table of business lines and a log of activities:

#	Date & Time	Agent	Pol	Log
172	09/08/2011 11:29	LSA	1	Int Correction Veh ** Changes Made to Vehicle: 2003 GMC ENVOY XL, 4DR 4WD 4.2L - 1G
171	08/23/2011 12:58	LSA	2	Int Correction Coverages PROP Forms ** Added the following Mortgage on Personal Prop
170	08/10/2011 13:34	LSA	1	Mail From Comp Change Renew ** Renewal Date: 11/01/2011 at \$5560.00
169	08/10/2011 13:27	LSA	2	Phone From Ins Print Invoicing ** Add Invoice #1066 for \$1520.00 due on 09/09/2011
168	08/10/2011 12:54	LSA	0	Int Summary
167	08/10/2011 12:23	LSA	2	Phone From Ins Print Certificate of Liability (025) ** Email Sent Direct To: n...@american
166	08/10/2011 12:12	LSA	2	Phone From Ins Print Certificate of Liability (025) ** Email Sent Direct To: n...@american
164	08/07/2011 19:15	LSA	0	Email Attachment(s) To Other ** Email Sent Direct To: landerson@hawksoftinc.com Sub
163	08/04/2011 20:42	LSA	2	Close Suspend on Log 149
162	08/04/2011 19:59	LSA	2	Close Suspend on Log 160
161	08/04/2011 19:58	LSA	2	Int Correction Locations PROP Forms ** Add new Location : 0004 [] : 4200 Glenn S
160	08/04/2011 19:49	LSA	2	Int Correction Locations ** Add new Location : 0004 [] : 4200 Glen Street []
159	07/22/2011 12:04	LSA	2	Int Forms
158	07/12/2011 07:09	LSA	2	Mail From Comp Print Certificate of Liability (025)
157	07/12/2011 07:09	LSA	2	Phone From Ins Print Certificate of Liability (025)
156	07/12/2011 07:05	LSA	2	Phone From Ins Print Certificate of Liability (025)
155	07/11/2011 10:16	LSA	1	Close Suspend on Log 150
154	07/01/2011 08:15	LSA	2	Int Forms



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