

Boot Camp #1: Navigate CMS Like a Pro

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Help Resources

- Use the ?
 - HawkSoft CMS Help
 - Tip: Use the “Search” Box
 - Training Guides
 - Training Videos
 - HawkSoft Community
 - We WANT to hear YOUR suggestions!

Tips: Searching for a Client

- Open in New Tab
- Partial Text Search
- Search List

Tips: Navigating Client Files

- Log Note Filters
- Never be afraid to RIGHT-CLICK
 - Log Notes
 - Attachments
 - Column Headers
- Attachment Grouping & Filters
- View Attachments for All Policies
- Click on hyperlinks to see more information!

Tips: Using the Action Menu

- Log vs Communication
 - Text formatting
 - Client Tag
 - Suspenses
- Print/Create
 - The most common ACORD forms
 - Letters & Memos
 - Other ACORD forms
- Send Email

Tips to *ALWAYS* Remember!

Almost everything in CMS starts with three simple steps:

1. Search for, and retrieve Client File
2. Select the Policy
3. Click the Action Button

Tips to *ALWAYS* Remember!

Almost everything in CMS starts with an *ACTION* and ends with a *LOG NOTE*.

All log notes can be:

1. Formatted (using bold, italic, colored fonts)
2. Tagged for importance
3. Suspended for follow-up

Corresponding documentation can always be linked to the log note by dragging and dropping a document, photo, etc. to the log note!

HawkLink

- Mapping Fields
- Capture
- Virtual Printer



YOUR TURN

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What questions do you have?

THANK YOU!

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