

# Boot Camp #4: Using what you learned

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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!



How would you search for a client when you just know the first name?

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You need to find an attachment from a prior term, what do you think is the easiest way to accomplish this?



When reviewing Policies on the client tab, how can you add the address column?

When reviewing Personal on the client tab, how can you add the driver's license column?

A customer calls needing the Customer Service phone number for their auto carrier. How can you find that information quickly in HawkSoft CMS?

What if you needed the email address of the underwriter for that same client?



What item from the Action Menu would choose to access the most common ACORD forms, such as a binder or certificate?

You need to send an email to your insured. How would you start that process in HawkSoft CMS?

Larry called and needs a binder emailed to him for his home owner's policy. Walk through the steps to accomplish this task.

If I wanted to have a follow up reminder to confirm Larry received the binder, what would I choose to do?



Launch the carrier's website from a policy. How would you...

- Map fields to be filled in from HawkSoft CMS?
- Save a screenshot to the client file?
- Print and attach a copy of the web page to the client file?

A customer calls to make a change to a policy. What are some benefits of doing the action first in HawkSoft CMS? Walk through the process.

A coworker calls in sick and you need to see if there are any suspenses for them. How would you access this information?



# 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!



YOUR TURN



What questions do you have?

# THANK YOU!

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