

# AppX Sales Program Setup and Reporting Guide for HawkSoft Users



AGENCY PERFORMANCE  
PARTNERS



# About your trainer

## Stephen Harrington-Descoteaux



Stephen Harrington-Descoteaux, CIC has more than 15 years of insurance management experience. After eight years of restaurant and retail management experience, he turned his focus to the insurance industry. As an agency trainer, power HawkSoft user, and process creator, he brings his fresh vision and insight to the quickly changing business world. He believes that everyone can be successful with proper training and encouragement. His passion lies in helping agencies succeed by building training and business plans around the agency's culture. Stephen obtained his CIC designation in 2009 and has since built a strong network in the insurance community. Through building relationships, speaking at national conferences, networking, and personal branding. He stays on top ranging from current technology, insurance, office, marketing, and management trends by attending several conferences each year as well as reading various trade publications and blogs. He has a strong understanding of the information that insurance agents need to succeed.

**"BE YOURSELF. BE BOLD. BE DARING. BUILD YOUR OWN TRIBE. SURROUND YOURSELF WITH PEOPLE YOU ADORE. IT MAKES LIFE SO MUCH BETTER. IF WE ALL DRANK TEA THERE WOULD BE NO TEQUILA." -STEPHEN**

### Best Friend to Insurance Agents

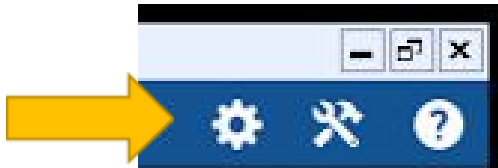
Over the past several years, Stephen has spent time working on his own brand, Diva of Insurance, and working with HawkSoft agents to clean their data, create custom AMS processes, and train new management members on reporting and monitoring through their management system. Through accountability and training, he has helped agencies grow and often exceed their goals. By joining the team at Agency Performance Partners, Stephen is able to serve his customers more effectively by working alongside a team of professionals highly regarded and deeply entrenched in the industry that he loves so much.



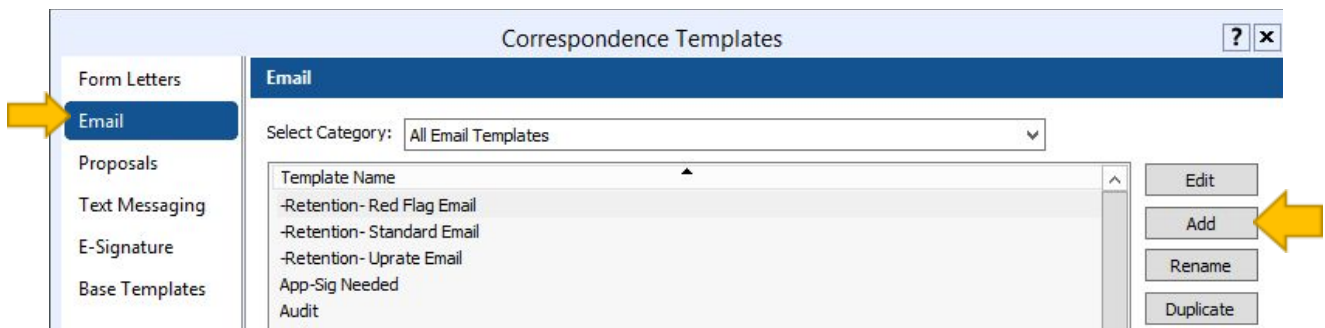
# Setting up Templates

## Email Templates

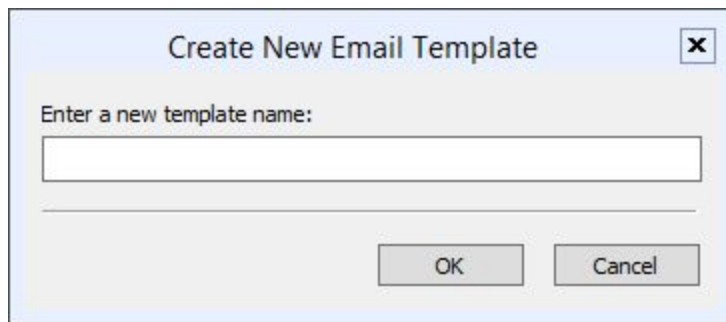
Click on the Cog in the upper right hand screen, then select “Correspondence Templates”



A new screen will open. You will need to Click on “Email”, then “Add”

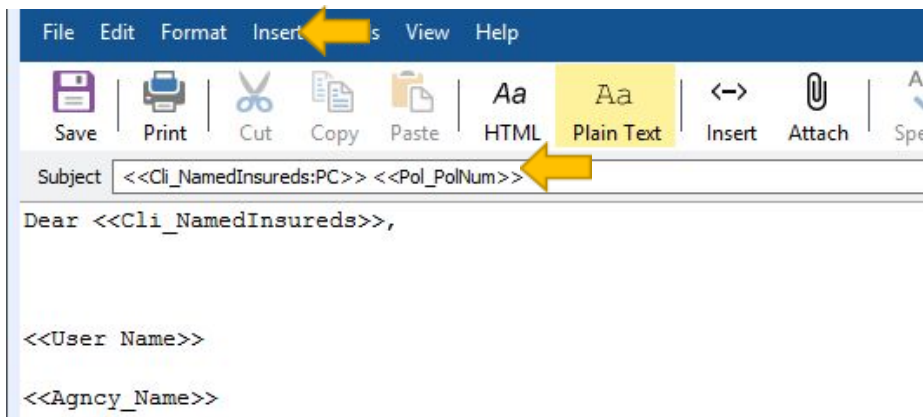


The “Create New Email Template” window will open

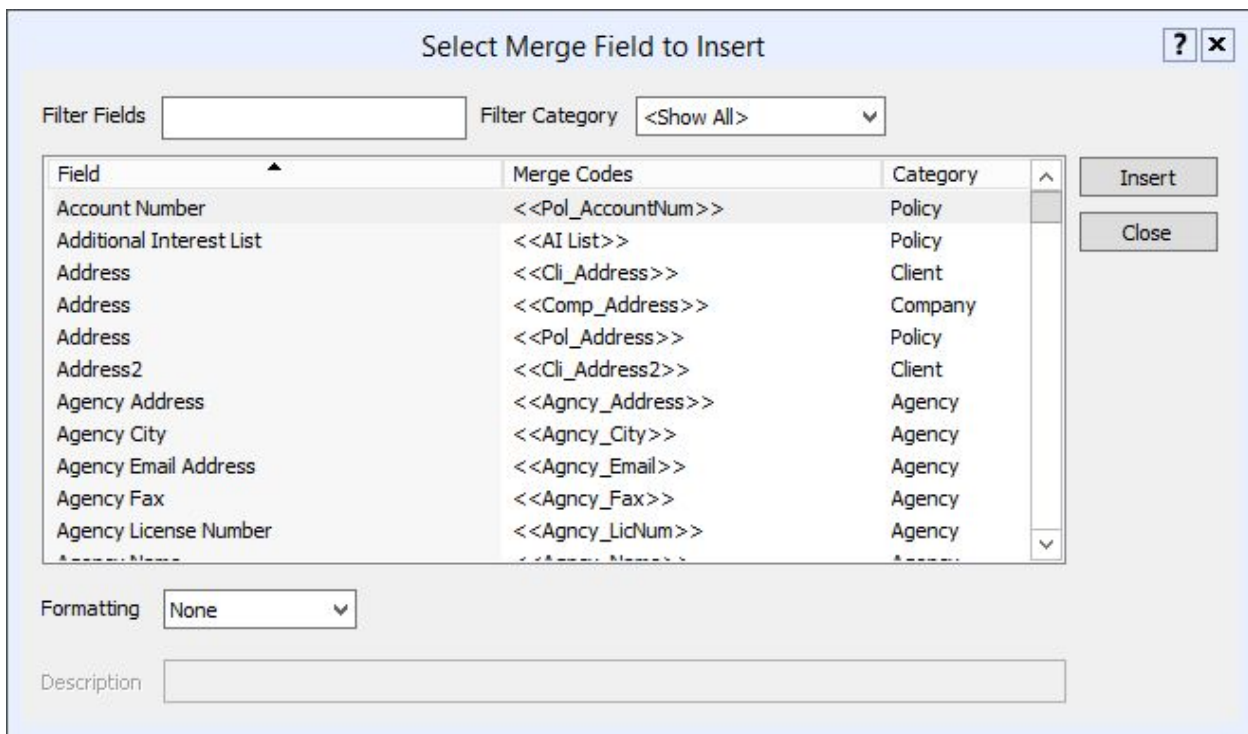


Enter the New Template Name and the click “OK”

The Email Template Editor will open



By clicking on “Insert” then “Field” a list of available merge fields will open.



Select the Field you would like added to the letter then click “Insert” one time.

Click “Close” and the Merged Field will now be in the letter.

\*By adding the appropriate fields to the Email the information will pull directly from the client file into the letter.

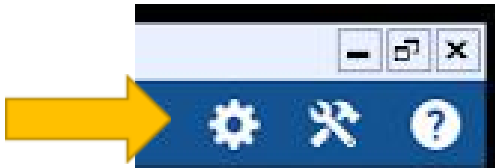
Click the “Save” to save your template to the library.

**\*A list of recommended Email Templates can be found in the Sales Guide or by reaching out to your APP trainer.**

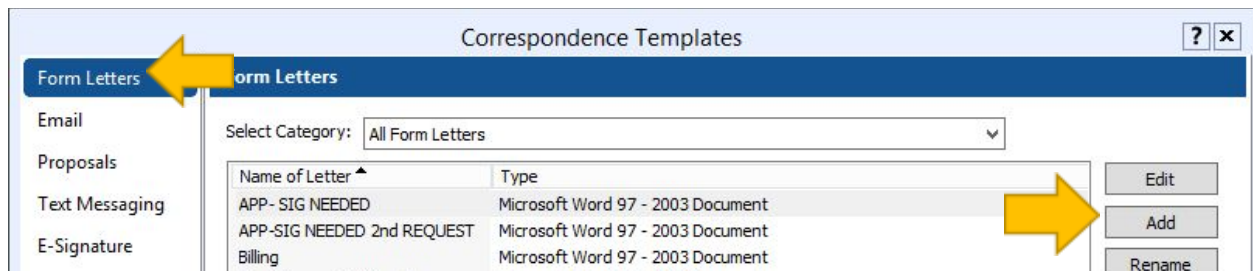


## Form Letter Templates

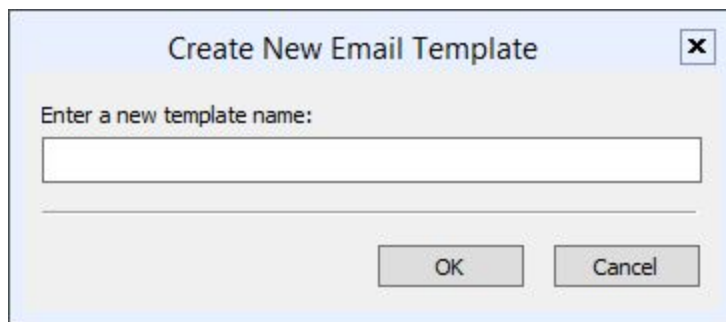
Click on the Cog in the upper right hand screen, then select “Correspondence Templates”



A new screen will open. You will need to Click on “Form Letters”, then “Add”

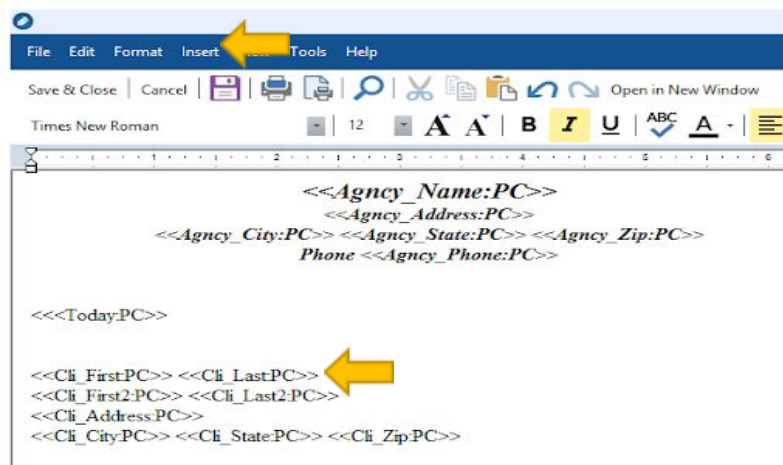


The “Create New Email Template” window will open



Enter the New Template Name and the click “OK”

The Mail Template Editor will open



By clicking on “Insert” then “Field” a list of available merge fields will open.

Field	Merge Codes	Category
Account Number	<<Pol_AccountNum>>	Policy
Additional Interest List	<<AI List>>	Policy
Address	<<Cli_Address>>	Client
Address	<<Comp_Address>>	Company
Address	<<Pol_Address>>	Policy
Address2	<<Cli_Address2>>	Client
Agency Address	<<Agncy_Address>>	Agency
Agency City	<<Agncy_City>>	Agency
Agency Email Address	<<Agncy_Email>>	Agency
Agency Fax	<<Agncy_Fax>>	Agency
Agency License Number	<<Agncy_LicNum>>	Agency

Select the Field you would like added to the letter then click “Insert” one time.

Click “Close” and the Merged Field will now be in the letter.

\*By adding the appropriate fields to the Form Letter the information will pull directly from the client file into the letter.

Create a new letter for the following:

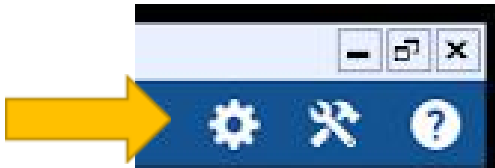
-Retention- Bad Contact

Click the “Save & Close” to save your template to the library.

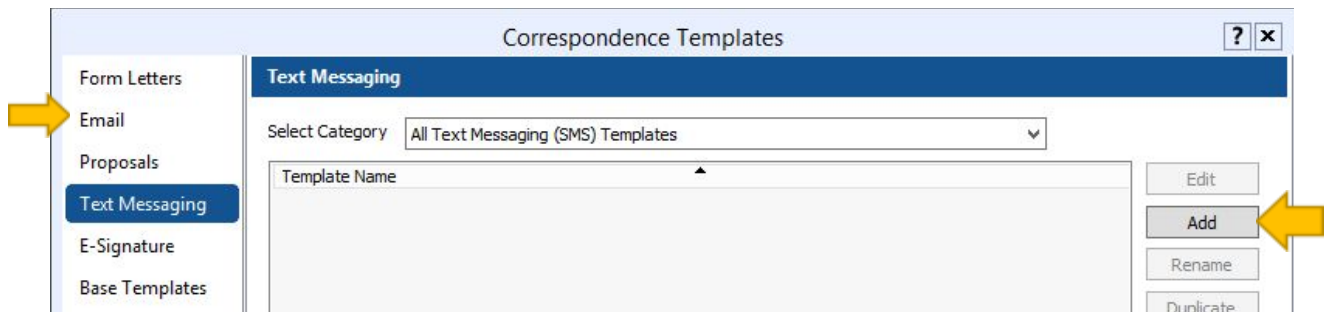
**\*A list of recommended Letter Templates can be found in the Sales Guide or by reaching out to your APP trainer.**

## Text Templates

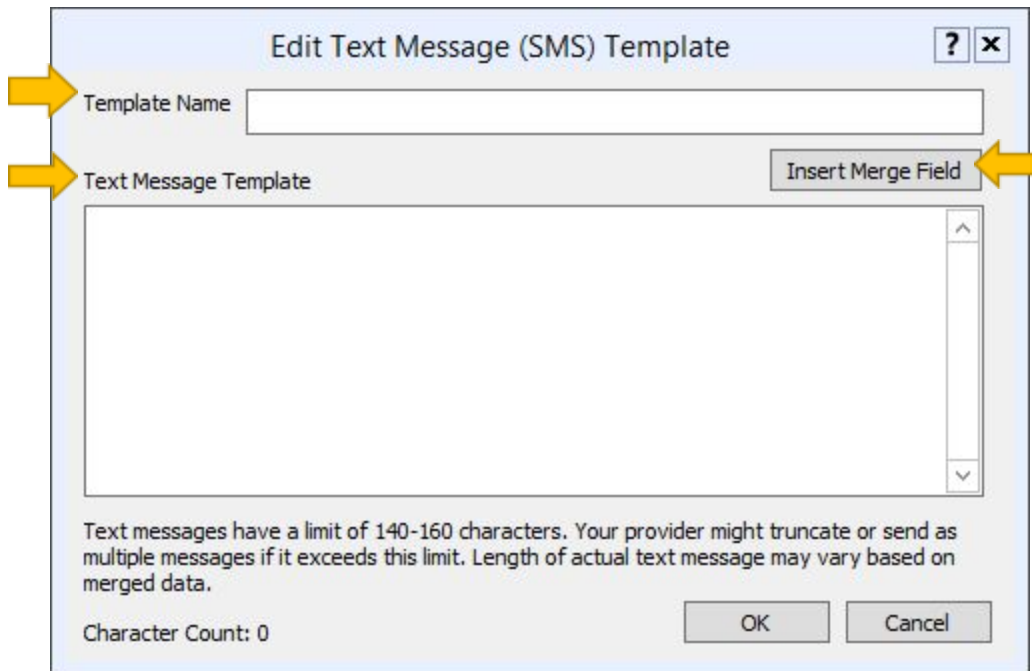
Click on the Cog in the upper right hand screen, then select “Correspondence Templates”



A new screen will open. You will need to Click on “Text”, then “Add”



The “Edit Text Message Template” window will open



Enter the New Template Name, then enter the Message.

By clicking on “Insert Merge Field” the list of available merge fields will open.

?
x

### Select Merge Field to Insert

Filter Fields 
Filter Category <Show All>

Field	Merge Codes	Category
Account Number	<<Pol_AccountNum>>	Policy
Additional Interest List	<<AI List>>	Policy
Address	<<Cli_Address>>	Client
Address	<<Comp_Address>>	Company
Address	<<Pol_Address>>	Policy
Address2	<<Cli_Address2>>	Client
Agency Address	<<Agncy_Address>>	Agency
Agency City	<<Agncy_City>>	Agency
Agency Email Address	<<Agncy_Email>>	Agency
Agency Fax	<<Agncy_Fax>>	Agency
Agency License Number	<<Agncy_LicNum>>	Agency

Formatting None

Description

Insert
Close

Select the Field you would like added to the message then click “Insert” one time.

Click “Close” and the Merged Field will now be in the letter.

\*By adding the appropriate fields to the Text the information will pull directly from the client file into the letter.

Click the “Save” to save your template to the library.

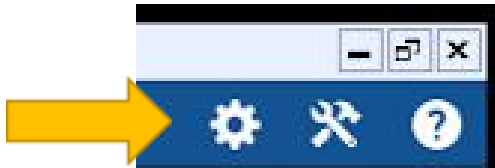
**\*A list of recommended Text Templates can be found in the Sales Guide or by reaching out to your APP trainer.**



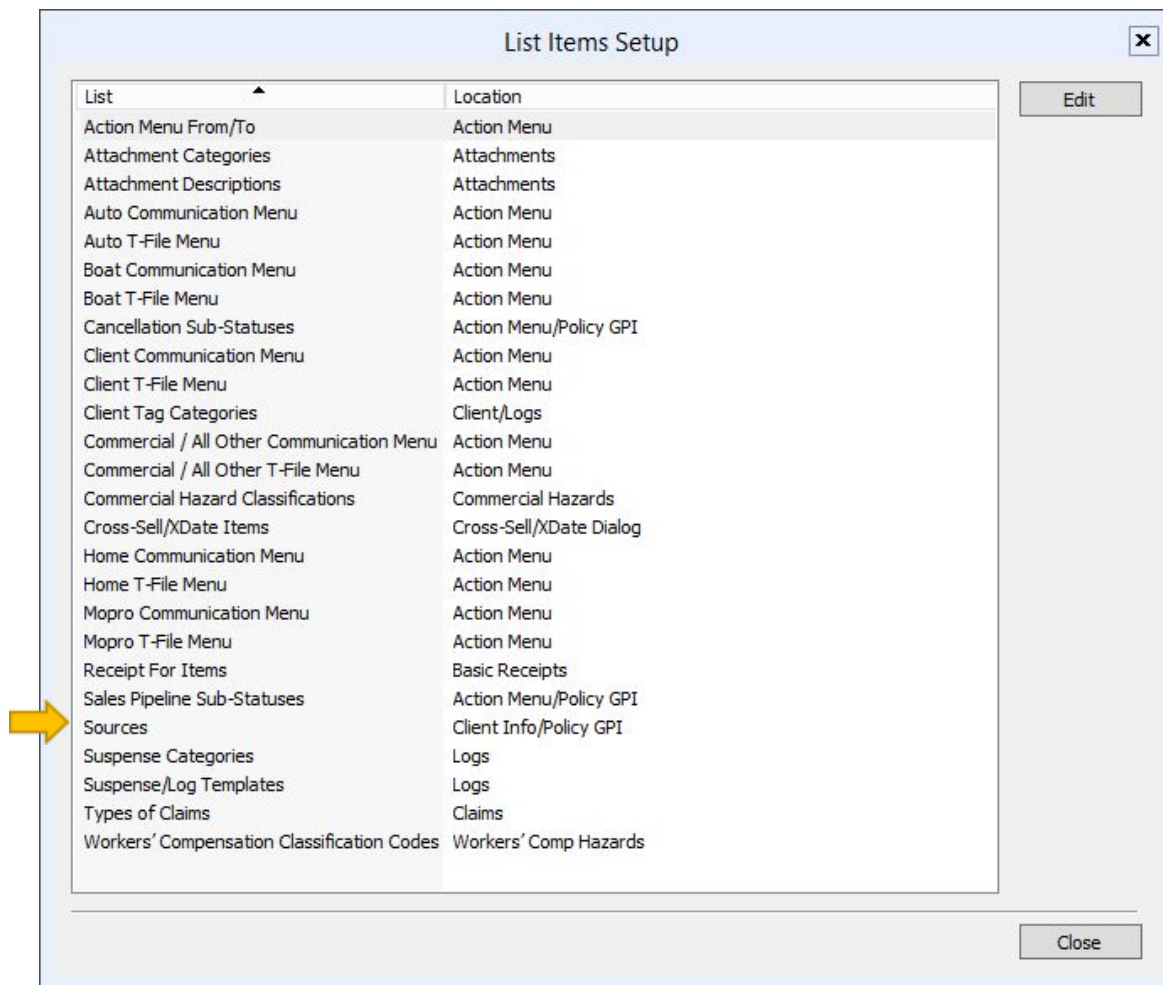
# Customizing Lists

## Updating Source Codes

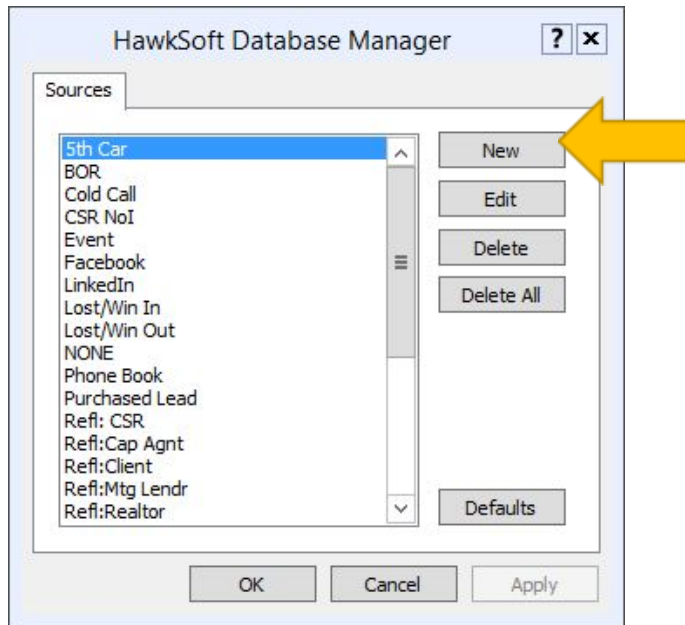
Click on the Cog in the upper right hand screen, then select “Customize Lists”



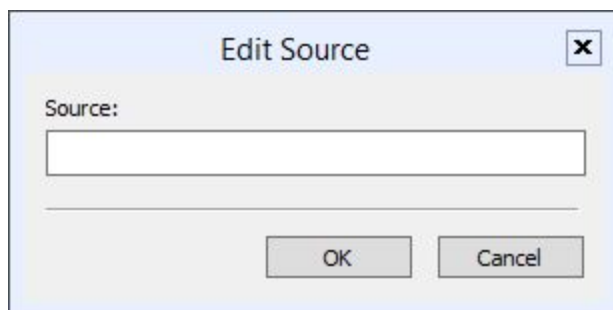
A new screen will open. You will need to Click on “Sources”



In the sub-menu click “New”



The "Edit Source" window will open



Add the Items listed in the "Source Codes" document one at a time making sure to click "OK" after each one.

**\*A list of recommended Source Codes can be found below. You may also wish to customize this list to better fit your agency's needs. If you need additional assistance in customizing this list please reach out to [www.divaofinsurance.com](http://www.divaofinsurance.com) or your APP trainer.**

## Source Codes List

**Source Definition:** For all new prospects and policies entered into HawkSoft it is imperative to ASK and DOCUMENT the way that the lead was sourced. For Prospects this will be documented at the client and policy level. For Existing customers this will be documented only at the policy level.

HawkSoft Source	Complete Source Name	Definition
5th Car Policy	5 <sup>th</sup> Car	5 <sup>th</sup> car policy
AR Cross Sell	Account Review Cross Sell	A Cross Sold policy from an account review.
AR Rewrite	Account Review Rewrite	A rewrite that is from an account review
BOR	Agent of Record	Agent of Record/Brokered (eff sold date)
CAP -	Captive Agent	Referral from a captive agent.
Carrier Assigned	Carrier Assigned	A policy that was written by the carrier and/or assigned to the agency for service
Carrier Refer	Carrier Referral	A referral from a Carrier
Client	Client Referral	Any referrals you receive from existing or former clients.
Cold Call	Cold Call	Reaching out to proactively to a prospect to see if they would be interested in a quote.
Community Even	Community Event	Trade Shows, Chamber Events, etc.
Cross In Cross Out	Cross Sell In – Customer Calls IN Cross Sell Out – Agent Calls OUT	A Cross Sell is when you add an additional line of business to an EXISTING client  Use <b>IN</b> for client calling in for new quote. Use <b>Out</b> for agent calling client proactively.
Employee	Referral from Employee of office	Friends, Family, Contacts of Employee
Facebook	Facebook	Leads from Facebook

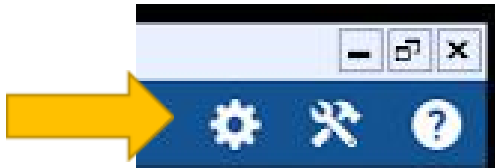
Google	Google	A prospect that found us on google
Ind-	Independent Agent	Referral from an independent agent
Internet Lead	Internet Lead	A prospect that found us online other than Google, a Carriers Site or our Website.
LinkedIn	LinkedIn	Leads from LinkedIn
Lost Soul In Lost Soul Out	Lost Soul Call In  Lost Soul Call Out	A Lost or Win Back is when a policy or client leaves the agency either by canceling or lapse <u>90 or more days in the past</u> .  Use <b>IN</b> for client calling in for new quote. Use <b>Out</b> for agent calling client proactively.
MTG-	Mortgage/Lender	Referral from a Mortgage Relationship
Networking	Networking Event/Group	Referral from a networking group or event
Newspaper	Newspaper	A prospect that found us in the newspaper
NONE	No Source	<b>Contact Manager before using this code.</b>
Purchased Lead	Purchased Lead	A list that has been purchased or procured for new business purposes.
Replacement Home	Replacement Home	A new home policy for a client that is selling current home.
Rewrite In Rewrite Out	Rewrite Call In Rewrite Call Out	A rewrite is when a policy lapses or cancels and is requoted/rewritten <u>less than 90 days of the cancel/lapse date</u>  Use <b>IN</b> for client calling in for new quote. Use <b>Out</b> for agent calling client proactively.
RLT-	Realtor	Any referrals from Realtor relationships
Spin-Off	Spin-Off	A Spin-off quote/policy is when splitting households in the case of a divorce or a child leaving home and purchasing their own policies.

Walk-in	Walk-in	When the client says they just saw your building, sign, etc. and does not indicate any other referral source
Web	Web Lead from our website	Website form "Get a Quote" or the client indicates they were on our website
Web:Carrier	Carrier Websites	Quotes received from any company website.
Yelp	Yelp	Found our office on Yelp
YouTube	YouTube	Found us on YouTube

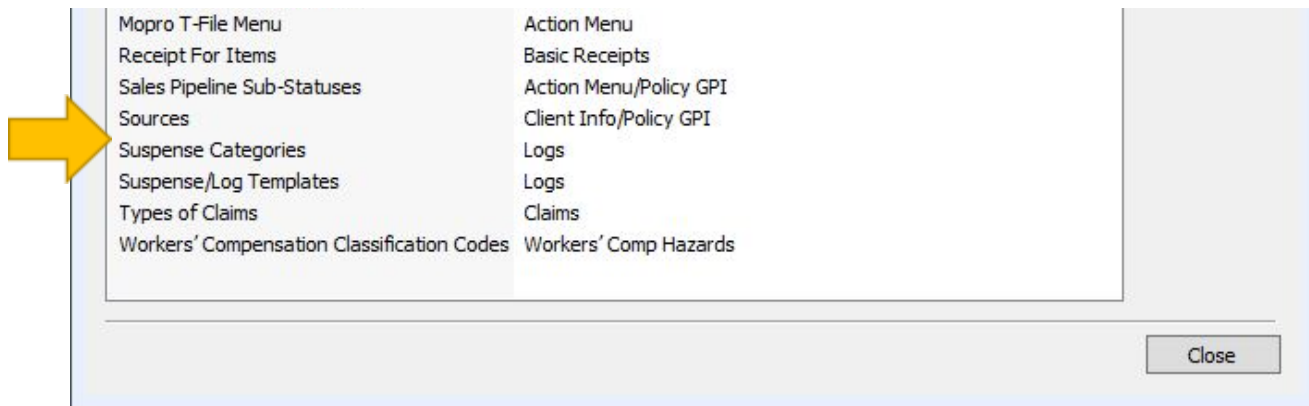


## Updating Suspense Categories

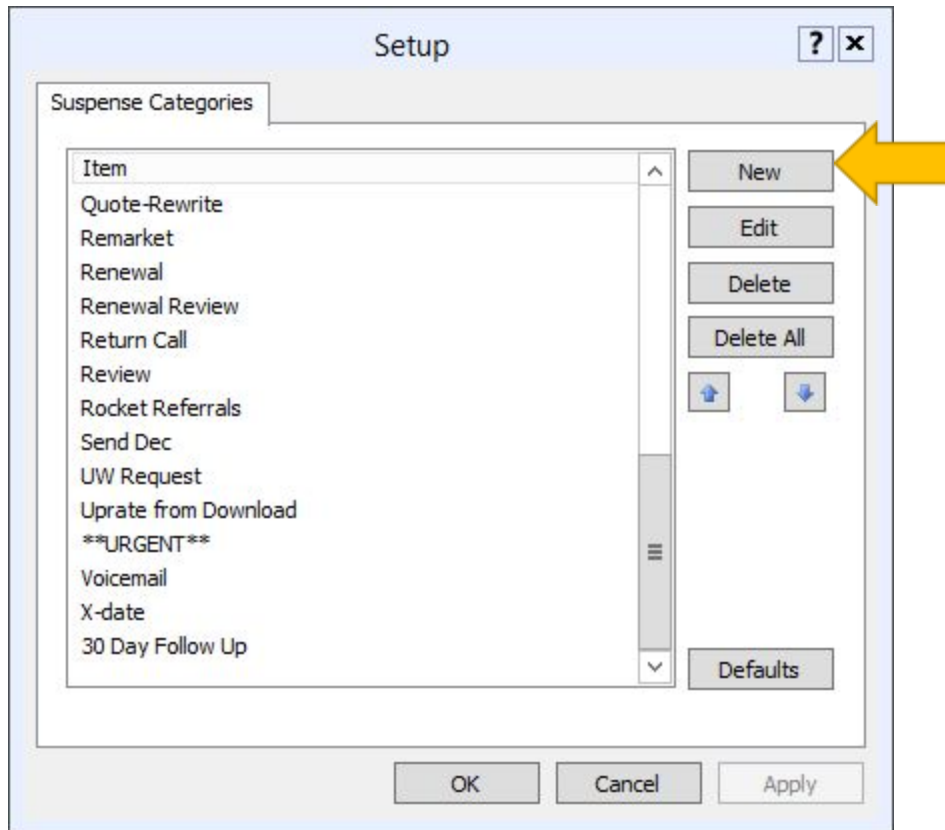
Click on the Cog in the upper right hand home screen, then select “Customize Lists”



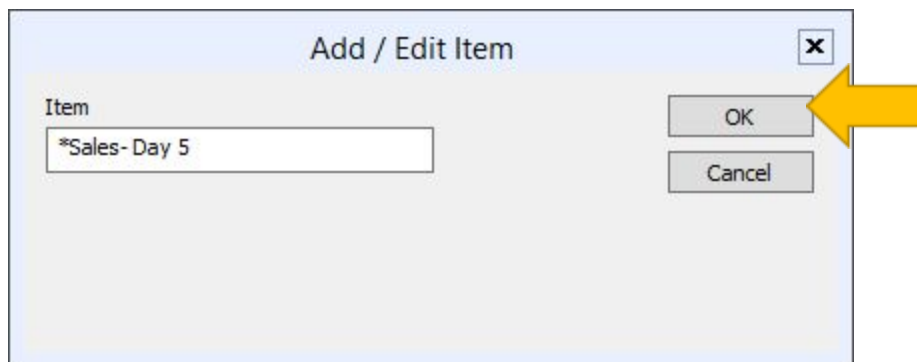
A new screen will open. You will need to select “Suspense Categories” under “List”



The “Setup” window will open

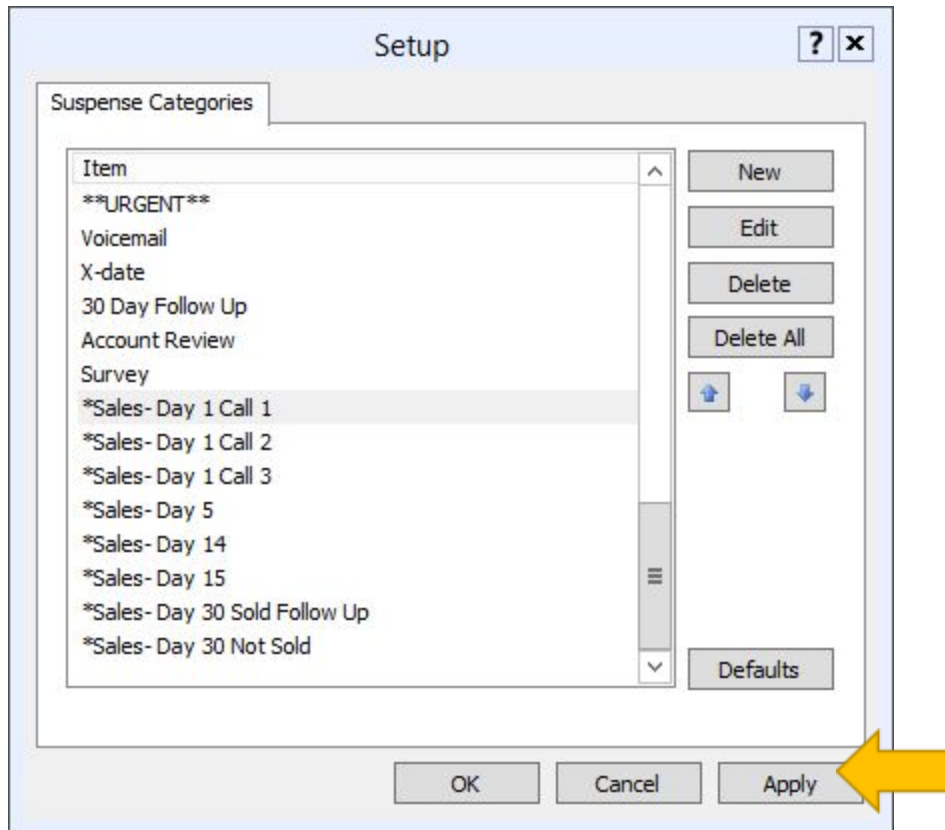


Click "New" and another window will open



Enter each item clicking "OK" then "New" until all have been entered

Once all items have been entered click on "Apply"



**\*A list of recommended Suspense Categories can be found below. It is not recommended to customize this list.**

# Suspense Categories List

**Suspense Categories:** Used for each stage of the sales process (similar to the Status) to know at a glance what the next follow up action is needed in the Suspense Reports.

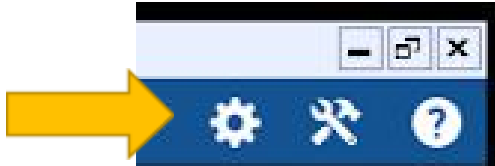
Suspense Category	Reason to Use
*Sales- Day 1 Call 1	<p>Prospect has reached out for a quote through email, online or voicemail. Insert the Client or Line of Business using "Prospect- Day 1 Call1 as the Status and set a suspense to the appropriate person as a priority 1 using the suspense category "Sales- Day 1 Call1"</p> <p>This category is a TOP PRIORITY to reach out to. This category means that the Prospect has not yet spoke with an agent to give information needed to provide a quote yet.</p> <p>If no contact is made create new log by updating the Status to Prospect- Day 1 Call 2 and suspend for the same day using Suspense Category *Sales- Day 1 Call 2</p>
*Sales- Day 1 Call 2	<p>Second Attempt to make contact with prospect in the first day.</p> <p>If no contact is made create new log by updating the Status to Prospect-Day 1 Call 3 and suspend for the same day using Suspense Category *Sales- Day 1 Call 3</p>
*Sales- Day 1 Call 3	<p>Last Attempt during the first day to make attempt to make contact with prospect.</p> <p>If no contact is made create new log by updating the Status to Prospect-Day 2 and suspend for the next day using Suspense Category *Sales- Day 2</p>
*Sales- Day 2	<p>For any *Sales- Day 2 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 4</p>
*Sales- Day 4	<p>For any *Sales- Day 4 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 6</p>

*Sales- Day 6	For any *Sales- Day 6 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 8
*Sales- Day 8	For any *Sales- Day 8 suspense that was not solved create a new log by updating the Status to Prospect-Day 10 –Break Up and suspend for 2 days in the future using Suspense Category *Sales- Day 10 -Break Up
*Sales- Day 10 -Break up	<p>For any Sales- Day 10 suspense where the client was never reached to get the information to quote the next step is the “Break Up”. Send “Break Up” message by creating a new log then update status to Prospect- No Response.</p> <p>For any *Sales- Day 10 suspense where the client was provided with and quote but never responded to quote the next step is the “Break Up”. Send “Break Up” message by creating a new log then update status to Refused- No Response.</p>
Quote- New Business	If the information is received but the quote cannot be completed over the phone suspend for the same day as Quote- New Business. Remember we need to return the quote within 24 hours.
Quote- Rewrite	If an existing client has a policy that needs to be rewritten and the quote cannot be completed over the phone suspend for the same day as Quote-Rewrite. Remember we need to return the quote within 24 hours.
*Sales- Day 15 Issued	*Sales- Day 15 is the first time to check in after a policy has been issued. You will then set a suspense for 14 more days in the future using the Suspense Category *Sales- Day 30 Issued
*Sales- Day 30 Issued	Once a policy has been issued you need to set a 30 day follow up to make sure the client is satisfied with service, coverage, etc.

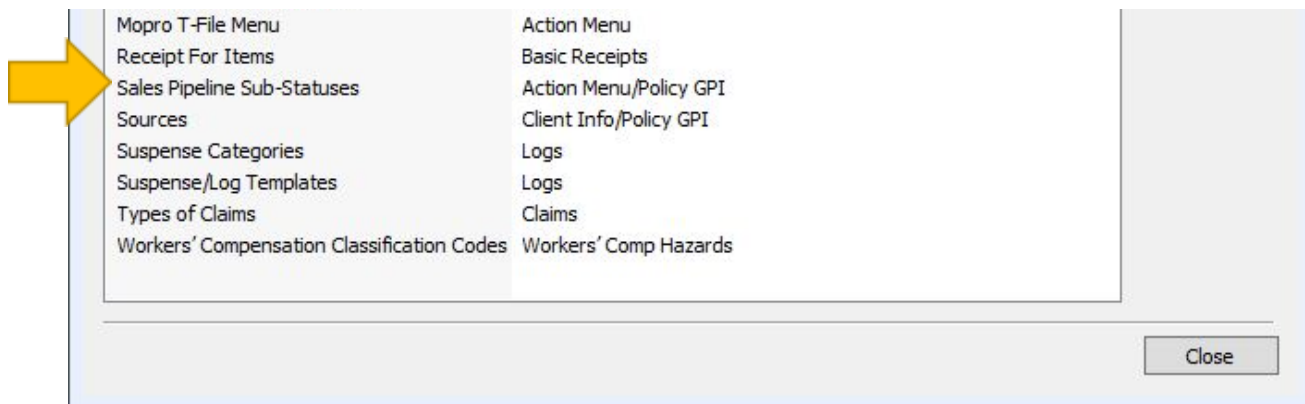


## Updating Sales Pipeline Sub-Statuses

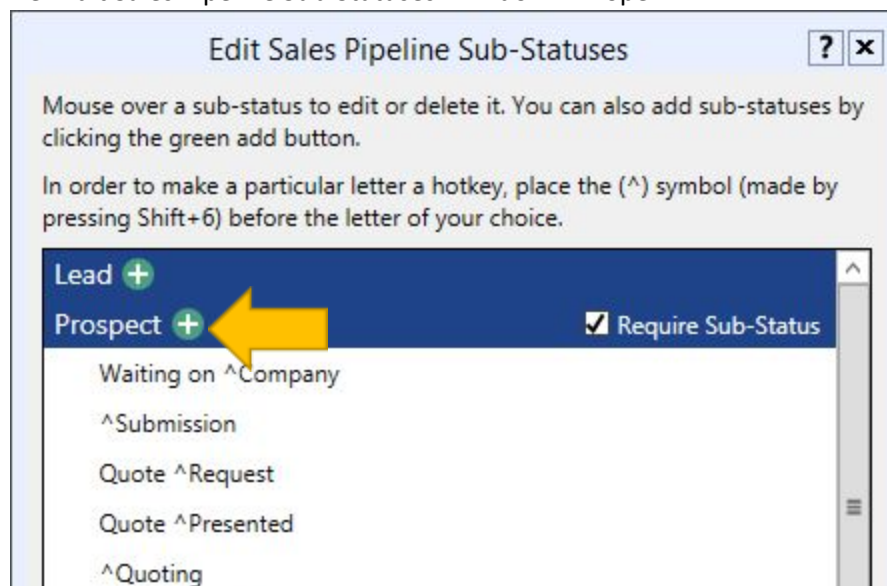
Click on the Cog in the upper right hand home screen, then select “Customize Lists”



A new screen will open. You will need to select “Sales Pipeline Sub-Statuses” under “List”



The “Edit Sales Pipeline Sub-Statuses” window will open



Click the Green



then enter a sub-status into the box

Enter a sub-status  
Refused +

You will also need to click on the “Require Sub-Status” Box  before exiting.

**\*A list of recommended Sales Pipeline Sub-Statuses can be found below. It is not recommended to customize this list.**

## Sales Pipeline Sub-Status List

**All new prospects are entered into HawkSoft as they arrive NOT as they are quoted.**

We will be tracking the closing ratios and follow up process in HawkSoft by using policy statuses and effective dates. As your lead progresses you will need to keep your policy statuses updated for reporting. Here are the definitions of the statuses:

Client Status	Definition
Lead	A person that has not requested a quote (purchased leads, employee's contacts, trade show list, etc.)
Prospect	A person that has requested a quote
Active	A Client with at least 1 Active policy
Dead	A Prior Client that no longer has any Active policies with the agency.
Policy Status	Definition
Lead	No communication has been made with person (purchased leads, employee's contacts, trade show list, etc.)
Prospect- Day 1 Call 1	URGENT! Contacted office through email, web, voicemail, etc.
Prospect- Day 1 Call 2	Second attempt, in the first day, to connect with the prospect.
Prospect- Day 1 Call 3	Third attempt, in the first day, to connect with the prospect.
Prospect- Day 2	Second attempt needs to be made to connect with the prospect.
Prospect- Day 4	Third attempt needs to be made to connect with the prospect.
Prospect- Day 6	Fourth attempt needs to be made to connect with the prospect.
Prospect- Day 8	Fifth attempt needs to be made to connect with the prospect.

<b>Prospect- Day 10 -Break Up</b>	Final attempt needs to be made to connect with the prospect. Break Up notice needs to be send out. If unsuccessful in connecting with prospect update status to Prospect- No Response
<b>Prospect-No Response</b>	We were unsuccessful in connecting with the prospect to get the information needed to quote and have placed our 6 follow up calls.
<b>Prospect – Waiting on Client</b>	You are waiting on client for additional information to finish the quotes (not used for a client that has quote and has not made a decision)
<b>Prospect –Waiting on Co.</b>	Application has been submitted to carrier and agent is waiting for the quote to be returned
<b>Prospect – Quote Request</b>	Someone has requested a quote by phone or walk in and you are actively talking to them.
<b>Prospect – Quoting</b>	We have the information and the quote is in process to be created as it could not be completed over the phone.
<b>Prospect – Quote Presented</b>	We have connected with the client and delivered the quote and are waiting on a final decision
<b>Refused- Price Not Comp.</b>	When we aren't close to their current pricing
<b>Refused- Didn't Buy Risk</b>	Use this when they don't move forward with a purchase (car, home, etc.)
<b>Refused- Like Agent/Co</b>	They looked but wanted to stay with the current Company or Agent.
<b>Refused-No Response</b>	We spoke with the prospect and provided a quote but have received a response after our 6 follow ups over 2 weeks.
<b>Refused-Not Good Fit</b>	Based on agency standards the prospect is not a good fit
<b>Refused-State Min</b>	The client has state minimums and is unwilling to improve coverage
<b>Refused-Other</b>	Used for one off situations
<b>Rejected- U/W</b>	The risk was rejected by underwriting
<b>Rejected- Agency Disqualified</b>	Based on insurance history the client is not qualified

The “Refused” statuses are only used for lines of business that have been quoted.

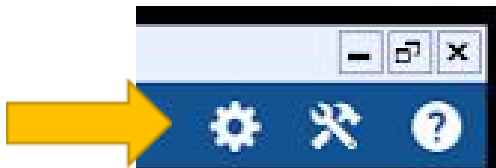
If the line of business was never quoted it will stay in one of the “Prospect” statuses.

## User Permissions

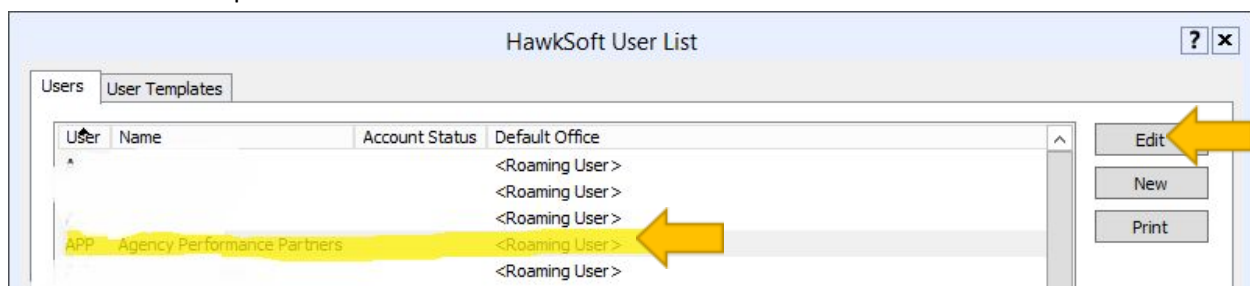
As a manager you will be using several reports to check on progress, compliance, performance and production. Some agencies also want key members of their staff, or all staff, to be able to run these reports as well. As with any setting in HawkSoft it is important to review your agencies policies and procedures before allowing access to any additional information in HawkSoft. This guide below will show you how to give access to different report types to the individual users in your agency. If you need additional assistance with understanding the pros and cons of each type of report you should reach out to your APP trainer, [www.divaofinsurace.com](http://www.divaofinsurace.com) or HawkSoft support.

### Updating Individual User Permissions

Click on the Cog in the upper right hand screen, then select “User List”



A new screen will open. You will need to click once on the individual users name and then select “Edit”




A new window will open, Select “User Permissions” then scroll to “Reports”



User Profile for Agency Performance Partners (APP)

General

**User Permissions** 

Preferences

Information

Commissions

Calendar

Email

Batch Email

Text Messaging

E-Signature

Phone Dial-Out Integration

User Permissions

User Permissions

AppWriter Permissions

**▼ Reports**

☐ Receipt Report

☐ Receipt Report Access - New, Edit, Void, Reissue, and Export Receipts

☐ Allow 'Browse Other Location' when opening a receipt book

**▼ View Receipt Report Days**

☐ Last 2 Days Only


☒ All

**▼ View Receipts**

☐ User's Receipts Only

☒ All Users' Receipts

☒ Advanced Reports

☒ Agency Intelligence 

☒ Sales & Retention

☒ Create New Reports

☒ Run Memorized Reports

☒ Batch Log

☒ Activity Report

**▼ Output of Advanced Reports/Activity Reports**

☐ Do not allow Printing, Saving, and Exporting of Report Data

☐ Only Allow Printing of Form Letters, Envelopes, Invoices and Statements

☒ Allow Printing, Saving, and Exporting of Report Data

☒ Export Client Files from Reports

☒ Suspense Report (of other agents)

☒ Download Report

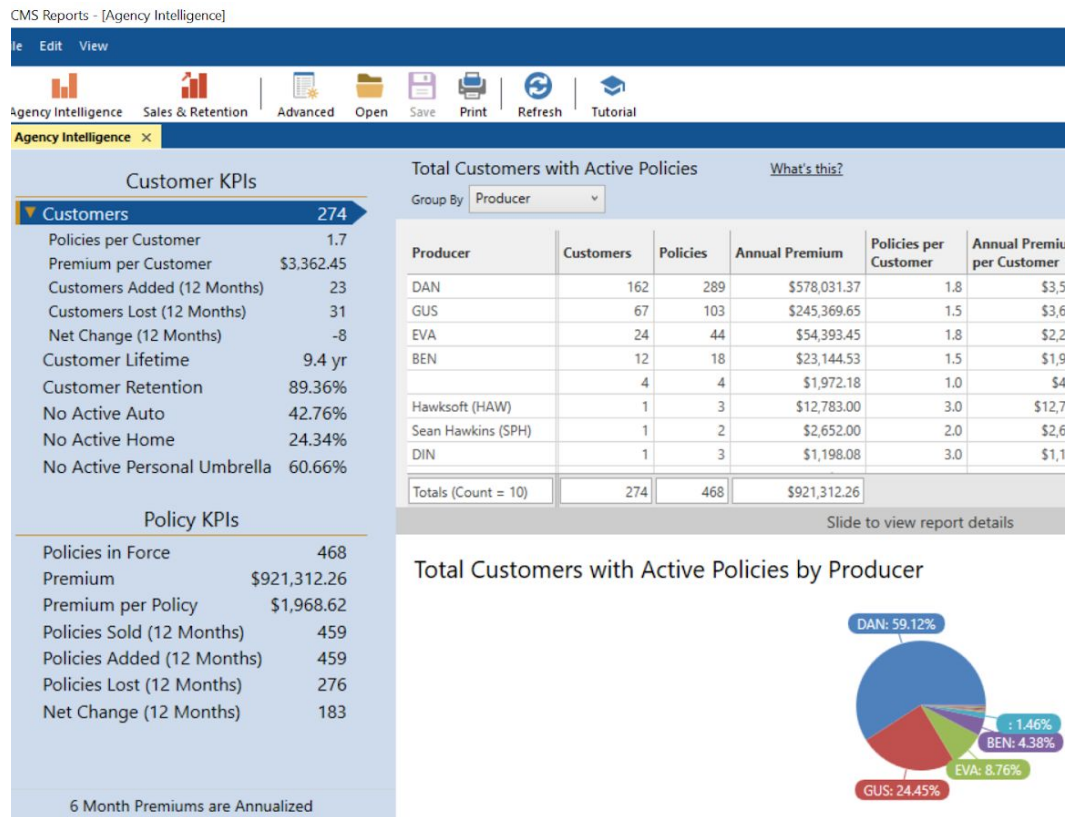
☒ Batch Email

You will then need to select the reports that you want the individual user to have access to. Great care should be used when selecting which reports you want each person to have access to.

# Report Types

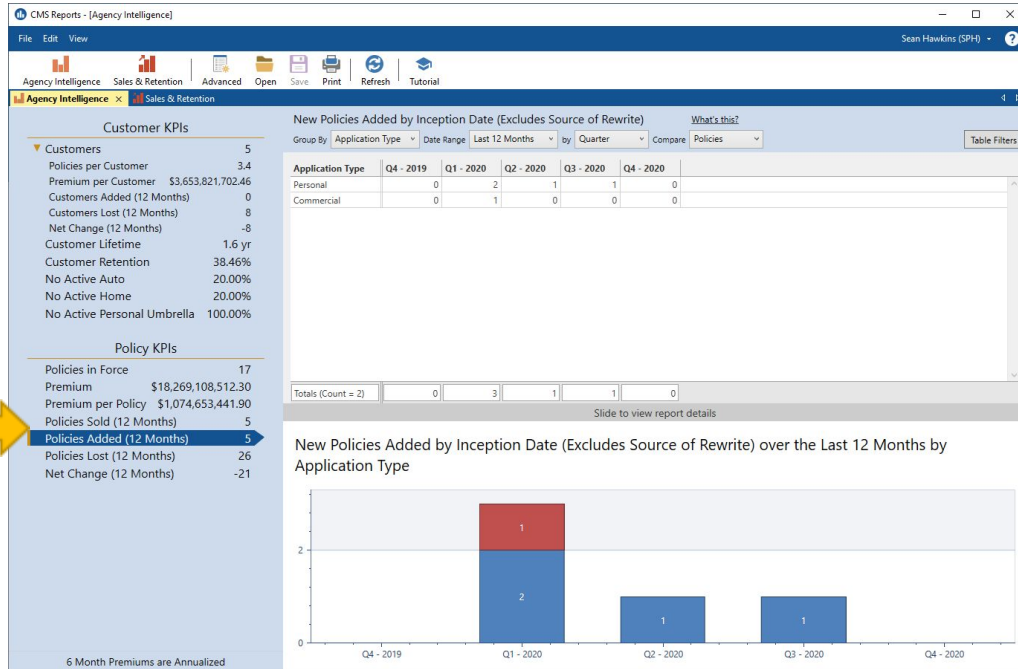
This section will highlight various types of reports available to you in HawkSoft

## Agency Intelligence Report



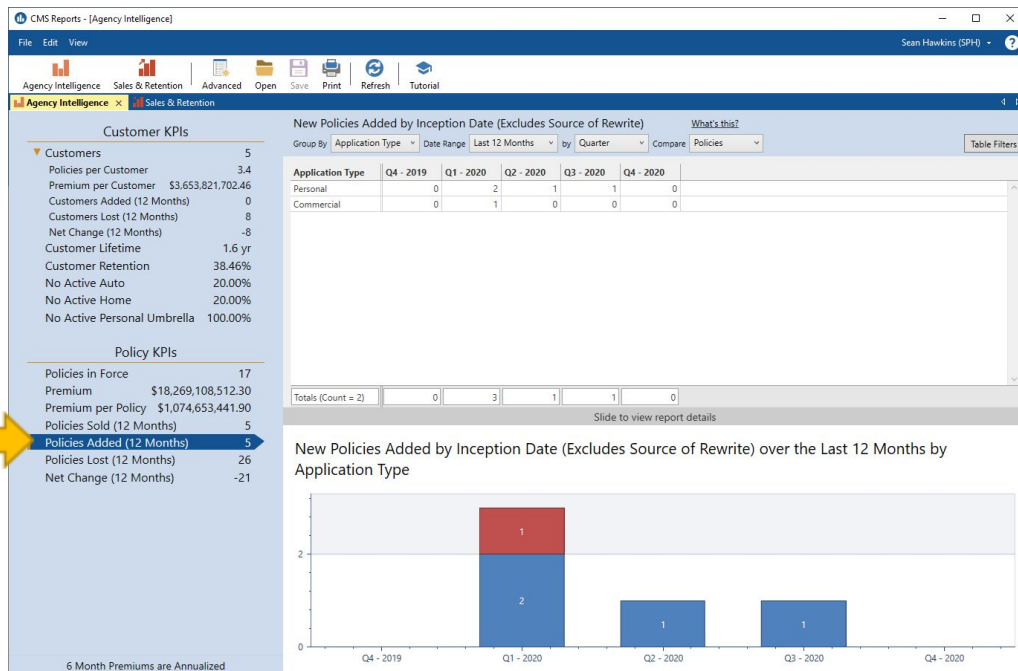
- **Agency Intelligence provides access to several predefined reports which track Key Performance Indicators (KPIs).**
- **These KPIs are based on your agency's "book of business" (customer and policy data that currently exists in CMS).**
- **The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to measure and evaluate your agency's overall performance.**

## Agency Intelligence Policies Added



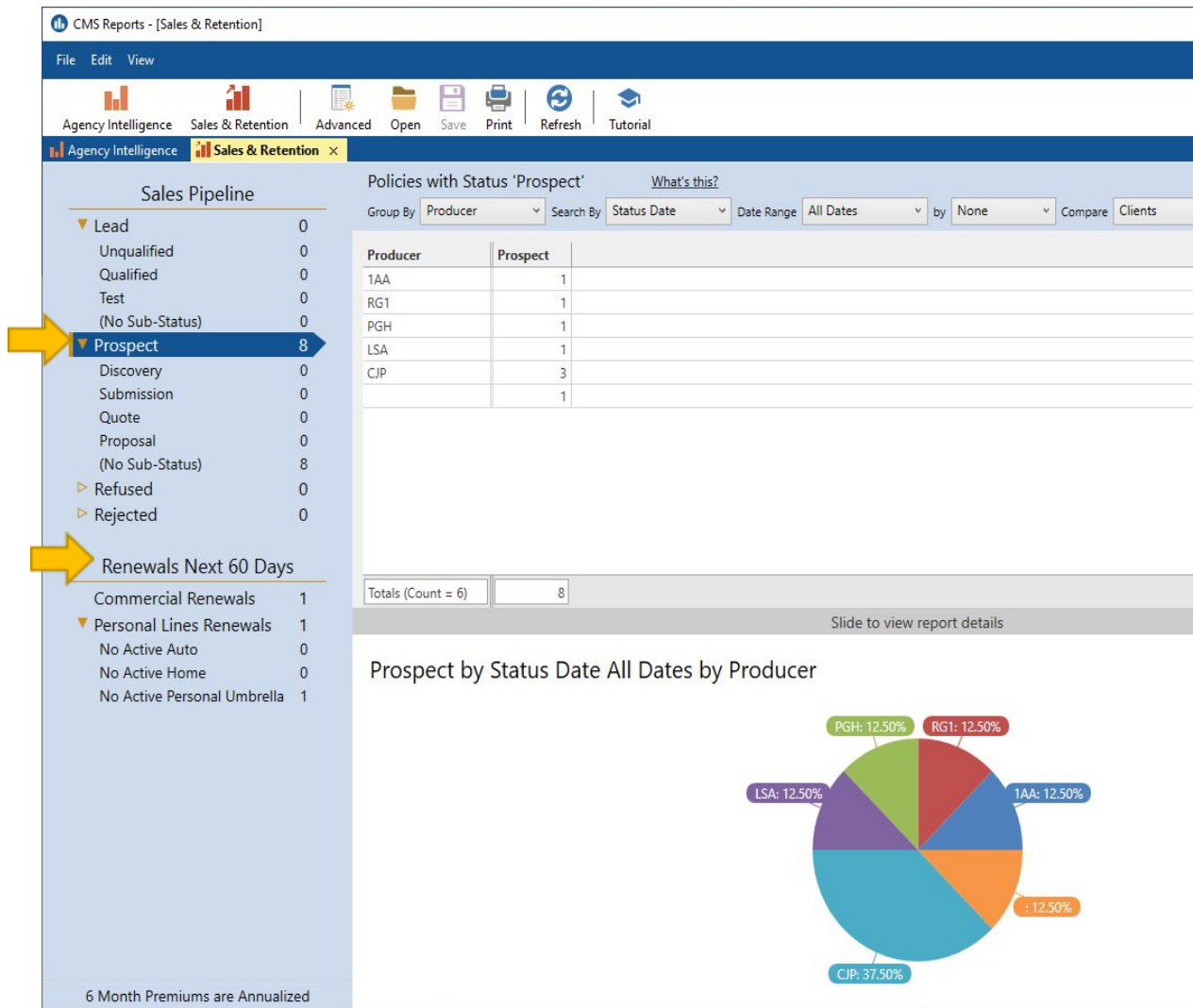
**NOTE: Policies with the Source set to Rewrite are excluded from this report. Rewrite is used to indicate that the coverage was rewritten to another carrier and is not a "new" policy.**

## Agency Intelligence Policies Lost



**NOTE: Policies with the status of Replaced are excluded from this report. This status is used to indicate that the coverage was rewritten to another policy (not "lost").**

## Sales and Retention Report



Sales and Retention provides access to several predefined reports which include sales pipeline and renewal data.

These metrics are based on your agency's customer and policy data that currently exists in CMS.

### Common Reports

- Prospect Pipeline
- Sales Pipeline Sub-status
- Renewals Next X Days

\*6 Month Premiums are Annualized

## **Advanced Reports**

The screenshot shows a 'Policy Type Filter' dialog box. It has a title bar with a question mark icon. The main area is divided into two columns. The left column is titled 'Policy Types' and contains a list of checkboxes: 'All Policy Types' (checked), 'Auto', 'Home', 'Boat', 'Moppro', and 'Commercial / All Other' (checked). The right column is titled 'Does NOT have Active Policy' and contains a list of checkboxes: 'Auto', 'Home', 'Boat', 'Moppro', and 'Commercial / All Other'. Below these columns is a 'Report By' section with a radio button selected for 'Policy' and other options: 'Client (At least one policy must match criteria.)', 'Client (All policies must match criteria.)', 'Personal Profiles', 'Cross-Sell/XDates', 'Claims', and 'Client Tags'. At the bottom right, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

The HawkSoft CMS Advanced Reports enables you to run customized reports that include any combination of client, policy, claims, and marketing information from data stored in CMS client files.

- Create and store customized reports
- Filter and summarize the data
- Use generated reports as the basis for [batch emails](#) and [form letters](#)

### **Common Advanced Reports:**

Renewal Report (Expiration Report)  
Current Active Clients Report  
Cancelled Policies Report  
Cancel Pending Report  
Policies by Company Report (Book of Business)  
Production Report (Inception Date)  
Birthday Report  
XDate Report  
Claims Report  
Cross Sell Report



# Suspense Report

Client Management System - [Suspense Overview]

HAWKSOFT Client Tasks Suspense External Tools Reports Accounting View Sean Hawkins (SPH) Settings Help

Search Previous Next Scratch Print Action HawkLink Client Texts Rater Appetite Manual Cancel Issued Reinst Renew Endorse Invoice

Quick Launch

- COMMON TASKS
  - Search
  - Suspenses (49)
  - My Documents for Review (4)
  - Unmatched Documents (5)
  - Import Commission Stateme... (1)
  - Acquire / Scan
  - My Texts (0)
  - Unmatched Texts (0)
- RECENT
  - Incredible, Mack
  - Lastname, Jeremie J
  - UMATILLA COUNTY
  - Wolff, Andrea
- EXTERNAL TOOLS
  - Cli Editor
  - Include Files
  - Inbox
  - HawkLink
- HELP
  - Help
  - Training Guides
  - Training Videos
  - HawkSoft Community
  - Carrier Download List
  - IVANS Exchange
  - Chat Support
  - Support Session
  - Contact HawkSoft
  - HawkSoft Cloud Status

Start Page Incredible, Mack Report [import, testing] **Suspense Overview** Calendar

User Initials	User Name	Suspenses over 30 Days	All Past Due Suspenses	Open Suspenses	Total
BAB	BAB	1	1	0	
CAL	CAL	13	13	0	
CJP	CJP	19	19	0	
DTD	DTD	5	5	0	
GDP	GDP	6	6	0	
JRP	JRP	6	6	6	
LSA	LSA	13	13	0	
MIB	MIB	2	2	0	
NAW	NAW	0	0	1	
NEW	NEW	7	7	0	
PGH	PGH	1	1	0	
REN	REN	2	2	0	
SPH	Sean Hawkins	45	45	4	
XYZ	XYZ	1	1	0	

Filter: All Categories All Dates Before Date Before: Reset

Priority	Category	Suspense Date	Log Date	Company	Susp...	State
5		01/01/2000	05/05/2020		SPH	
5		04/24/2002	04/24/2002	Foremost Auto	SPH	CA
5		11/30/2019	11/25/2019	Safeco	SPH	OR
5		03/11/2020	03/12/2020	<Prospect>	SPH	
5		02/11/2020	02/12/2020	<Prospect>	SPH	

Re-Suspend Close Suspense Launch Customer

Client Name: Twin Oaks Farm Inc.  
Suspense Date: 01/01/2000 Suspended For: SPH Suspended By: SPH

Log Entry: 67 of 67  
Date: 05/05/2020 14:08  
User: Sean Hawkins (SPH)  
Policy: 00  
Subject: Create Submission ...

Submission sent to: Google Chrome  
Expected back: 01/01/2000  
Promised effective date: 01/01/2001

Summary of the Suspenses for all users, and a detailed list of Suspenses for each user. Often used to manage workflow and accountability.

## Activity Report

CMS Activity Reports - [Activity Report]

File Edit View

New Open Save Print Summary Filters

Activity Report (641 records) x

Filter  Apply Reset

#	First	Policy #	Log #	Date	Time	User	Pol	Log	Cust ID
1	Cory		331	10/08/2020	08:29	SAS	0	Re-Suspending log number 331	00038509
2			257	10/08/2020	08:52	MLP	10	Int Print/Create Forms	00019143
3	Emily		161	10/08/2020	08:57	JLW	0	Online From Ins Comm Policy Status	00037216
4			258	10/08/2020	09:03	MLP	10	Email To Comp Comm Coverage	00019143
5	Azarsally		670	10/08/2020	09:51	SAS	19	Int Change GPI	00027294
6	Joshua		2	10/08/2020	09:59	JLW	1	Phone To Ins Comm Quote	00047300
7	Joshua		3	10/08/2020	10:02	JLW	1	Phone To Ins Comm Quote	00047300
8	Robert		447	10/08/2020	10:02	SJP	7	Email From Comp Log U/W Memo	00005060
9	Joshua		0	10/08/2020	10:03	JLW	1	Unmatched Document Attached prog quote	00047300
10	Octavio		5	10/08/2020	10:04	JLW	1	Phone To Ins Comm Name/address	00028487
11	Charlie		156	10/08/2020	10:08	ICH	2	Close Suspense on Log 154	00026073
12	John		67	10/08/2020	10:16	CLH	4	Email From Ins Log email from John	00042030
13	Dorothy		149	10/08/2020	10:20	RLE	0	Int Log	00025977
14	Rosa		62	10/08/2020	10:21	ATW	0	Online To Ins Log	00027580
15	John		0	10/08/2020	10:23	AAJ	11	Unmatched Document Attached Umbrella proposal	00039987
16	Larry		1568	10/08/2020	10:24	JLW	24	Phone To Ins Change Name/Address, GPI Comm Quote	00032631
17	Larry		0	10/08/2020	10:26	JLW	24	Unmatched Document Attached umbrella quote	00032631
18	Anne		112	10/08/2020	10:28	DWN	2	Renewal Pending	00026742
19	Joseph		310	10/08/2020	10:28	DWN	7	Renewal Pending	00013534

The Activity for specified dates and users along with a detailed list of Activity Types (Log).

Create Summary

Summarize by

- Agent
- APrem
- Company
- Cust ID
- Date
- First
- Last
- Log
- Log #
- Pol
- Policy #
- Premium
- Source
- Status
- Time
- User
- Zip

Options

Premium Column

Group by

Summary

OK Cancel

Using the "Summary" function you can batch together information by User, Log, Status, Source, Etc.

## Download Report

CMS Download History Reports - [Last Processed Report]									
File Edit View									
New Open Save Print Summary Filters Columns Last									
Last Processed Report x									
Filter <input type="text"/> Apply Reset									
#	Sequence #	Download Date	Download Type	Transaction Purpose	Line Of Business	Carrier	Agent 1	Effective Date	Sent to Unmatched Reason
1	3783	09/08/2020	Policy Update	Renewal	AUTOP	Esamclaw P & C	AJC	10/09/2020	
2	4195	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	CLH	10/09/2020	
3	3335	08/21/2020	Policy Update	Renewal	HOME	The Travelers Home and Marine Company	AJJ	10/09/2020	
4	6151	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
5	4197	08/31/2020	Policy Update	Renewal	HOME	Grange Insurance Association	AJC	10/09/2020	
6	6109	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	ICH	10/09/2020	
7	4194	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
8	2290	08/21/2020	Policy Update	Renewal	HOME	Safeco Ins. Co of America	JMO	10/09/2020	
9	4201	08/31/2020	Policy Update	Renewal	PUMBR	Grange Insurance Association	SAS	10/09/2020	
10	0332	09/08/2020	Policy Update	Renewal	AUTOP	Mutual of Esamclaw	CLH	10/09/2020	
11	7878	09/08/2020	Policy Update	Renewal	HOME	Esamclaw P & C	CAC	10/09/2020	
12	0863	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	JMO	10/09/2020	
13	2293	08/21/2020	Policy Update	Renewal	AUTOP	Safeco Ins Co of Illinois	JMO	10/09/2020	
14	6368	08/21/2020	Policy Update	Renewal	HOME	Safeco Ins. Co of America	CAC	10/09/2020	
15	6107	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	CNP	10/09/2020	
16	6152	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
17	2705	09/08/2020	Policy Update	Renewal	AUTOP	Mutual of Esamclaw	ICH	10/09/2020	
18	2292	08/21/2020	Policy Update	Renewal	AUTOP	Safeco Ins Co of Illinois	JMO	10/09/2020	
19	0002	08/24/2020	Policy Update	Renewal	AUTOP	Essentia Insurance Co.	CNP	10/09/2020	
20	4196	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	

The Downloaded information from carriers into HawkSoft.

# Custom Reports

## Setup New Prospect/ Source Report

To Setup the report for the first time:

Select “Reports” then “Activity Reports”



“Activity Report” will open in a new window

Fill in “Start Date” and “End Date”

Then select the appropriate User from the dropdown (or leave field blank to get all users activity)

Click “Next”

On the “Report Layout” screen click “Add/Edit”

Add the following fields to the fields that were already there:

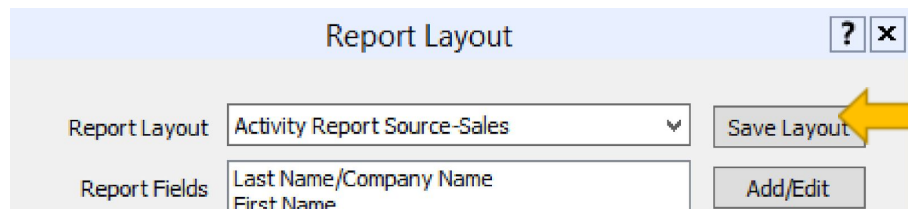
Client Producer

Agent

Client Source

Source

Click “Save Layout”



Report Layout

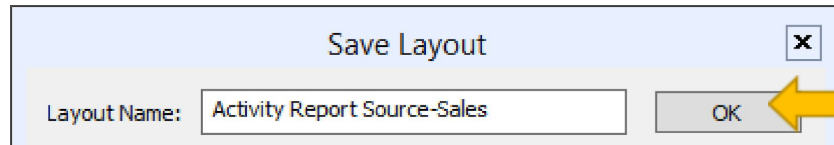
Report Layout: Activity Report Source-Sales

Report Fields: Last Name/Company Name, First Name

Save Layout

Add/Edit

Enter the unique name “Activity Report Source-Sales” then click “OK”



Save Layout

Layout Name: Activity Report Source-Sales

OK

## Running New Prospect/ Source Report

The purpose of the this report is to better understand what activities each agent has accomplished in the designated time period.

Select “Reports” then “Activity Reports”



“Activity Report” will open in a new window

Fill in “Start Date” and “End Date”

Then select the appropriate User from the dropdown (or leave field blank to get all users activity)

Click “Next”

In the dropdown next to “Report Layout” select “Activity Report Source-Sales”

**Report Layout** [?] [x]

Report Layout: Activity Fields ▼

Report Fields:

- Last Name/Company Name
- First Name
- Policy Number
- Log Number
- Date
- Time
- User
- Policy
- Log
- Customer ID

Buttons: Save Layout, Add/Edit, Remove, Default Order

Click "Finish" and the report will run, then open

< Back Finish Cancel

In the dropdown next to "Filter" select "Log"  
In the empty box type "insert" and then click "Apply"

Activity Report (803 records) x

Filter: Log ▼ insert Apply

#	First	Log #	User	Pol	Log	Cust ID	C-Producer	Agent	Source	C-Source
1	Laura	1	SAS	1	Agriculture Insert Client	00047452	SAS			XSell Call Out
2	Raleigh	211	SAS	2	Int Insert Policy Agriculture	00000108	SJP	SAS	XSell Call Out	
3	Brian	304	SJP	4	Int Insert Policy Home/Dwelling	00012175	SJP	SJP	AR Round	AR Round
4	Ronald	68	SJP	2	Int Insert Policy Personal Auto	00002585	SJP	SJP		Review XSell
5	Robert	156	CLH	4	Int Insert Policy Personal Auto	00041893	CLH	CLH	Review Rewrite	Web:Company
6	Jason	120	SJP	5	Int Insert Policy Personal Umbrella	00034632	SJP	SJP	Review XSell	Review XSell
7	Jeffrey	361	CLH	6	Int Insert Policy Personal Umbrella	00025436	CLH	CLH	AR Round	Cross SellEC
8	jennifer	1	JLW	1	Personal Auto Insert Client	00047451	JLW	JLW	Web:CIA	Web:CIA

A new report will open with just the Clients/Policies inserted into HawkSoft within the date range specified.

With this report you can also verify that the Producer, Agent, Source and Client Source have been completed.

Any log with "Insert Client" is a new client file being entered into the system

Any log with "Insert Policy" is for an additional policy being added to a client file that is already in the system



The purpose of the “Sales Report” is to see the sales flow of rewrites as well as new business.

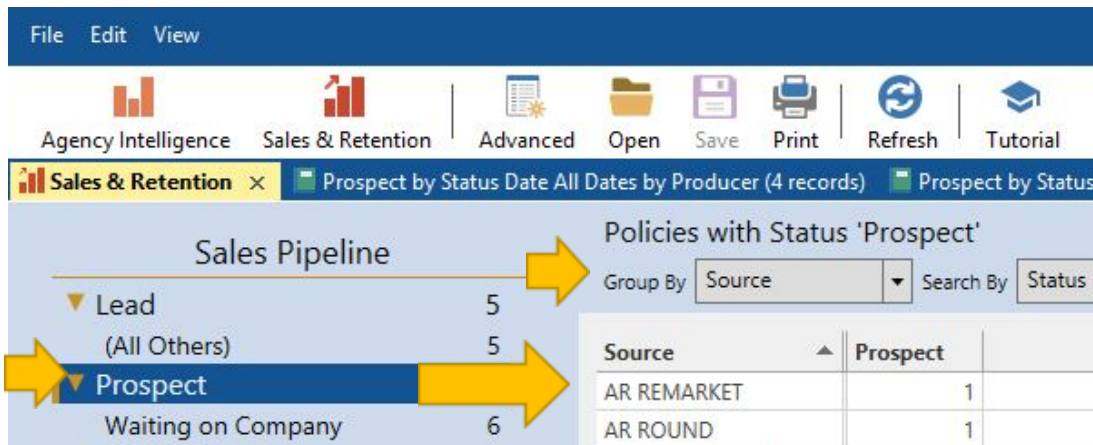
## Using the “Sales and Retention” Center for Prospect/Refused/Rejected Report

To find Quotes that have not been sold

Select “Reports” then “Sales & Retention”



“Sales & Retention” will open in a new window



Click “Prospect”

This shows the number of quotes that are still in the “Prospect” stage.

By clicking on the number under “Prospect” a new report will open with a list of the clients with the specified Source.

#	CustID	Last	First	StatusDet	StatusDate	Source	RelTypeBas	ApplType	LOBs
1	00046823	Test	Mia	Prospect: Quote Request	05/03/2020	AR Remarket		Personal	AUTOP



The same directions can be used for “Refused” and “Rejected” under “Sales Pipeline”

## Running a Sold Report

To find Policies that were Issued

Select “Reports” then “Agency Intelligence”



“Agency Intelligence” will open in a new window

Policy KPIs

- Policies in Force
- Premium
- Premium per Policy
- Policies Sold (12 Months)
- Policies Added (12 Months)**
- Policies Lost (12 Months)
- Net Change (12 Months)

New Policies Added by Inception Date (Excludes Sou)

Group By: Source Date Range: Last Month

Source	Week of 3/29	Week of 4/5	Week of 4/12	Week of 4/19
AR ROUND	2	5	2	
AR REMARKET	6	6	5	

Under “Policy KPI” click on “Policies Added”

Group by “Source”

The date range can be a specific time frame or week, month, etc.

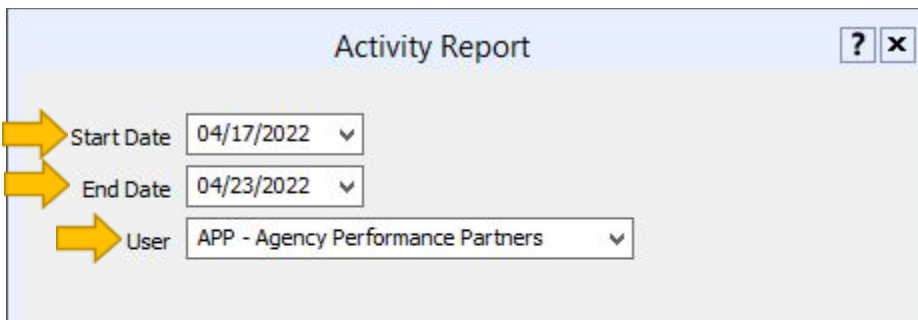
## **Run “Activity Report” in HawkSoft**

The purpose of the “Activity Report” is to better understand what activities each agent has accomplished in the designated time period. This could include what stages of the Sales Process were completed each week.

Select “Reports” then “Activity Reports”

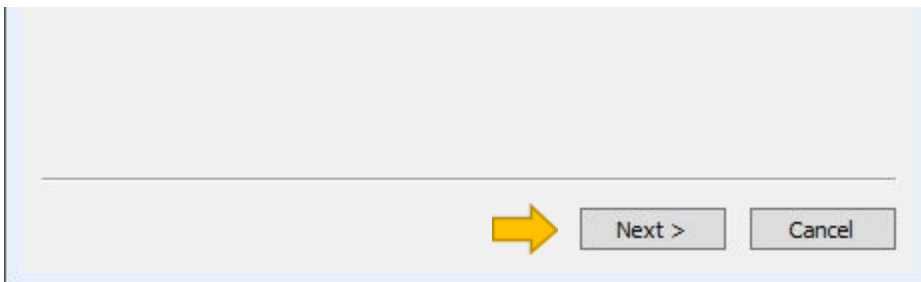


“Activity Report” will open in a new window

A screenshot of the "Activity Report" window. The window has a title bar with the text "Activity Report" and standard window controls (minimize, maximize, close). Below the title bar, there are three input fields with yellow arrows pointing to them from the left. The first field is labeled "Start Date" and contains the date "04/17/2022" with a dropdown arrow. The second field is labeled "End Date" and contains the date "04/23/2022" with a dropdown arrow. The third field is labeled "User" and contains the text "APP - Agency Performance Partners" with a dropdown arrow.

Fill in “Start Date” and “End Date”

Then select the appropriate User from the dropdown

A screenshot of the bottom portion of the "Activity Report" window. It shows a horizontal line separating the input fields from the bottom section. Below the line, there are two buttons: "Next >" and "Cancel". A yellow arrow points to the "Next >" button.

Click “Next”

The “Report Layout” window will open

Report Layout

Report Layout

Activity Fields

▼

Save Layout

Report Fields

Last Name/Company Name  
First Name  
Policy Number  
Log Number  
Date  
Time  
User  
Policy  
Log  
Customer ID

Add/Edit  
Remove  
Default Order

Click “Finish” and the report will run, then open

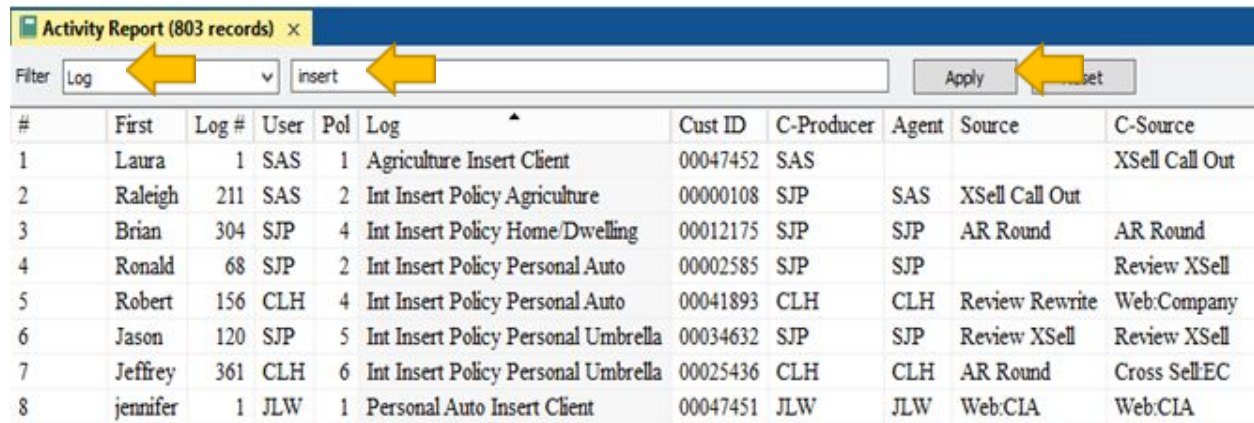


		Apply	Reset
Pol	Log		
0	Append To Existing Log		
5	Unmatched Document Attached Adding Husband and Truc		
0	Mail To Ins Log Please Mail Applications		
5	Unmatched Document Attached Quote adding husband and		
9	Int Insert Policy Motorcycle/RV		
9	Unmatched Document Attached Safeco Motorcycle Quote		
5	Unmatched Document Attached Jason's MVR 2 tickets		
9	Unmatched Document Attached Progressive Motorcycle \$		
9	Unmatched Document Attached Foremost Motorcycle \$1,8		
7	Int Dfile		
8	Closed Suspense on Log 224		
0	Append To Existing Log		
10	Int Insert Policy Personal Umbrella		
10	Unmatched Document Attached Grange Umbrella quote \$2		
0	Int Send Email To Customer		
0	Suspending log number 106		
0	Re-Suspending log number 223		
0	Re-Suspending log number 585		
4	Send Email Reply		

Click on “Log” one time sort the report in order of activity

To find specific activities in the Activity Report:


In the empty box type “Day 1 Call 1” (or whatever the specific activity you are looking for) and then click “Apply”

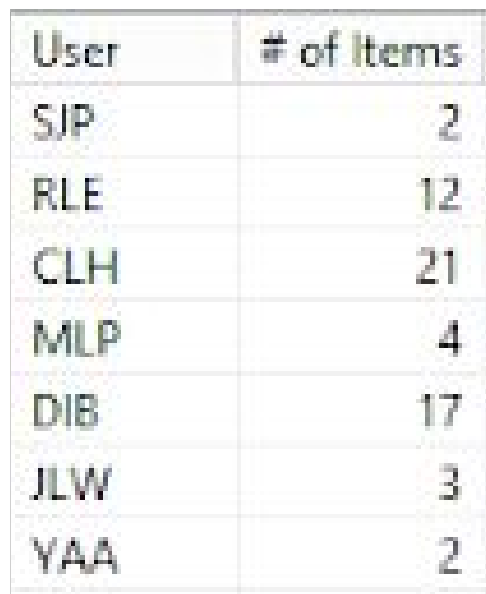


The screenshot shows the 'Activity Report (803 records)' window. A search filter is applied with 'Log' in the dropdown and 'insert' in the text box. The 'Apply' button is highlighted with a yellow arrow. Below the filter is a table with 11 columns: #, First, Log #, User, Pol, Log, Cust ID, C-Producer, Agent, Source, and C-Source. The table contains 8 rows of data.

#	First	Log #	User	Pol	Log	Cust ID	C-Producer	Agent	Source	C-Source
1	Laura	1	SAS	1	Agriculture Insert Client	00047452	SAS			XSell Call Out
2	Raleigh	211	SAS	2	Int Insert Policy Agriculture	00000108	SJP	SAS	XSell Call Out	
3	Brian	304	SJP	4	Int Insert Policy Home/Dwelling	00012175	SJP	SJP	AR Round	AR Round
4	Ronald	68	SJP	2	Int Insert Policy Personal Auto	00002585	SJP	SJP		Review XSell
5	Robert	156	CLH	4	Int Insert Policy Personal Auto	00041893	CLH	CLH	Review Rewrite	Web:Company
6	Jason	120	SJP	5	Int Insert Policy Personal Umbrella	00034632	SJP	SJP	Review XSell	Review XSell
7	Jeffrey	361	CLH	6	Int Insert Policy Personal Umbrella	00025436	CLH	CLH	AR Round	Cross SellEC
8	jennifer	1	JLW	1	Personal Auto Insert Client	00047451	JLW	JLW	Web:CIA	Web:CIA

A new report will open with just the Clients/Policies that match the search terms that were within the date range specified.

You can also then use “Summary”  by “User” to get a list of the specific activity by user



The screenshot shows a summary report with two columns: 'User' and '# of Items'. The data is as follows:

User	# of Items
SJP	2
RLE	12
CLH	21
MLP	4
DIB	17
JLW	3
YAA	2

To export this report to excel:

Click “File” then “Export” then “Report”

Select the correct location you would like the report saved to.

Create a custom name for the report, the "Save as Type" Comma Delimited Text (\*.csv)