Q & A

One Agent's View - HawkSoft 6 Migration (Webinar)

06/19/2024

The questions below were asked during the HUG webinar. We wanted to provide answers in the event anyone missed the information and as a supplement to the recorded webinar. However for a comprehensive overview of the migration process, FAQs and checklists, we recommend viewing the HawkSoft 6 - Migration Resource Page.

Q. What are the noticeable improvements on HS6?

Downloads come in continuously throughout the day without a user having to execute it. This means your system is up-to-date in real time. For agencies on Parallels, they just don't experience the lags and delays they previously experienced, particularly in dragging and dropping emails/attachments into the system is much faster. Reporting is SO MUCH FASTER!

Q. Does this transition or cleanup cost the agency?

There is no cost for the migration itself. However, once you move to HawkSoft 6, you may see adjustments to your billing for being on the new platform, particularly if you previously were on a local server. Your migration specialist should be able to help you understand what your new billing will be.

Q. Where are training videos for HawkSoft 6 located?

Check out the HawkSoft 6 Help Portal for training videos, help topics and FAQs.

Q. What do you mean by carrier cleanup?

Primarily, you are looking for duplicate companies. It's not unusual for companies to be entered more than once by mistake e.g. Progressive and Progressive Insurance Company. Or if companies have been purchased and need to be combined into one company. Here is the link to the latest Database Cleanup Guide. Go to Page 43 for Policy/Company Setup Cleanup information. There are also several webinars about database cleanup in our Recorded Webinar Archive. Search for 'cleanup' to locate the recordings. Also work with your Migration Specialist to identify any issues.

Q. Is there a list of things we should clean up before moving to HawkSoft 6?

This link goes to a HawkSoft page about the Preparatory Checklist which includes some items you should clean up before migrating. If you have detailed questions about this, you will want to get in touch with HawkSoft support or talk with a Migration specialist.

Q. How do we get on the list to try the sandbox?

To schedule a sandbox/installation appointment:
https://app.acuityscheduling.com/schedule.php?owner=12863007&appointmentType=50121909

Q. What is the date you must migrate to 6?
At this time, there is no final date that agencies have to migrate to HawkSoft 6 by. However, if you are in a Parallels environment, these hosting agreements will expire and you will have to choose to migrate or find an alternate host or move to a local server.

Q. For agencies that have data on an internal file server, how does the sandbox work?
A Migration Specialist will have you do a cloud sync from your system and then create the sandbox from that. You will have the sandbox in the cloud and retain and maintain your HawkSoft 5 system on your local server until you go live on HawkSoft 6.

Q. Is the sandbox just for looking around and/or training purposes? Nothing is saved?
The sandbox is a test environment. Its primary function is for training and allowing you to see how your data looks when migrated. You will typically be in the sandbox for 2 -3 weeks. A few things can be set up in the sandbox and will persist through the final migration, such as task templates. However any data that you change in the system regarding clients, policies, activities, tasks, attachments, etc. will not carry forward in the final migration. The intention is that you can play around and make mistakes and none of it will carry forward to when you do the final migration.

Note: Do not attempt to send text messages in the sandbox, because they will actually get sent to the individual.

Q. If we see 6 in the sandbox and don't like it, can we decide NOT to change?
If your system is on a hosted vendor (Parallels), then these hosting agreements will expire soon. If you chose to not move forward with a migration, you would have to find a new hosting vendor or move your system to a local server.

Q. If we set up an appointment with a migration specialist and get the list of things that need to be cleaned up or things to do to prep for HS6, is there a timeline that we need to follow from the time we have the initial appointment until starting sandbox?
The needs and amount of data requiring clean up will vary from agency to agency. Some agencies will be able to accomplish this in their two week sandbox period with minimal disruption, other agencies may wish to do this before they begin their Sandbox period. This is best discussed with your individual Migration Specialist.

Q. What did you mean by "tasks and rules setup" should be done before the first download?
Just like in HawkSoft 5, there are download rules (e.g. rate increase) and in HawkSoft 6, there are tasks that can be automatically created from the download. These rules setup do not migrate; therefore download rules and tasks setup will need to be completed prior to doing your first download. Make sure you've reviewed what you want these settings to be so they can be set up quickly before your first download.

Q. In policy company set up will HS6 have personal, commercial, etc tabs? Or is it all combined?

Policy/Company setup (now called Carrier Setup) has Personal Lines and Commercial Lines all combined into one Company record in HawkSoft 6.

Q. Can we add in the websites for the carriers in 6 and it will carry over with the migration?
If you add a website to a carrier in carrier setup in your HawkSoft 6 Sandbox, it would be overwritten during the final migration. It would be best to add this in your current version of 5, or add it in 6 after final migration.

In HawkSoft 6 there is still a website button that will launch the website you have assigned to that carrier in Carrier Setup

Q: If you use Outlook, can you still easily drag and drop emails and attachments to HawkSoft?
If you have a local installation of Outlook, you can very easily drag and drop emails into HawkSoft 6. Caveat: there is a beta version of Outlook that currently doesn't drag and drop to ***any*** program. If you are not on that beta version, it will work fine.

Q. Will the Pencil be available in Tasks?
Log notes and Tasks are now separate items in HawkSoft 6, although they work together. So there are separate templates for each. The Pencil will still be available when creating a log note, but when you are in a Task, you will select a Task Template from a drop-down list.

Q. Any changes with QuickBooks related to moving to HawkSoft 6?
HawkSoft 6 can integrate with either QuickBooks Online, or QuickBooks Desktop. QuickBooks Desktop will require the QuickBooks Web Connector to be downloaded and installed from Intuit's website for integration.

Currently, for QuickBooks, HawkSoft can only integrate with a single company file.

The accounting features in HawkSoft 6 have been updated significantly. Your Migration Specialist will be able to provide you with an Accounting Migration checklist and further guidance.

Q. Will we lose the bar on top where we have put all of our shortcuts such as {Payments and ID Cards (aka hot buttons and External Tools)?
External tools, and Toolbar customizations will not be lost. Some of these items may need to be reconfigured after migration, so we suggest working with your migration specialist to make sure all of your toolbar buttons are working as you anticipate during your Sandbox and after Final Migration.

Q. Do Policies need to be entered as a "prospect" in order for the download to find it?
Downloads match primarily based on Policy Number. It is not required that the Policy be set to prospect for the download system to match a download to it.

Q. Do the commissions split commissions (for agents) and commission importing work?
Yes. Initially when we began Migrations, these features were not available, but they have been recently implemented!

Q. Will we be able to access HawkSoft 6 anywhere, like on my phone?
Hawksoft 6 will run on any PC running Windows 10 or greater. The web based features that you can use from any device with a browser have been greatly expanded and there is a phone app that allows you to lookup clients and add log notes, but the full featured desktop app runs on Windows.

Q. Do all of the attachments in the client files migrate over?
Yes. Any attachments that are currently present in your HawkSoft 5 database will be migrated.

Q. If I have an Advanced Report template in HawkSoft 5, will it migrate to HawkSoft 6? What about Layout templates?
Advanced Report templates and layouts do not migrate to HawkSoft 6 and will need to be set up again. Saved reports can be exported and imported if you like.