Users: Management and Permissions in HS6

HUG
HawkSoft User Group
EMBRACING TECHNOLOGY TOGETHER

HAWKSOFT USER GROUP (HUG)

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Amelia Jach
HUG | Executive Director
amelia@hawksoftusergroup.org
(608) 449-9797
Works from home in Colorado



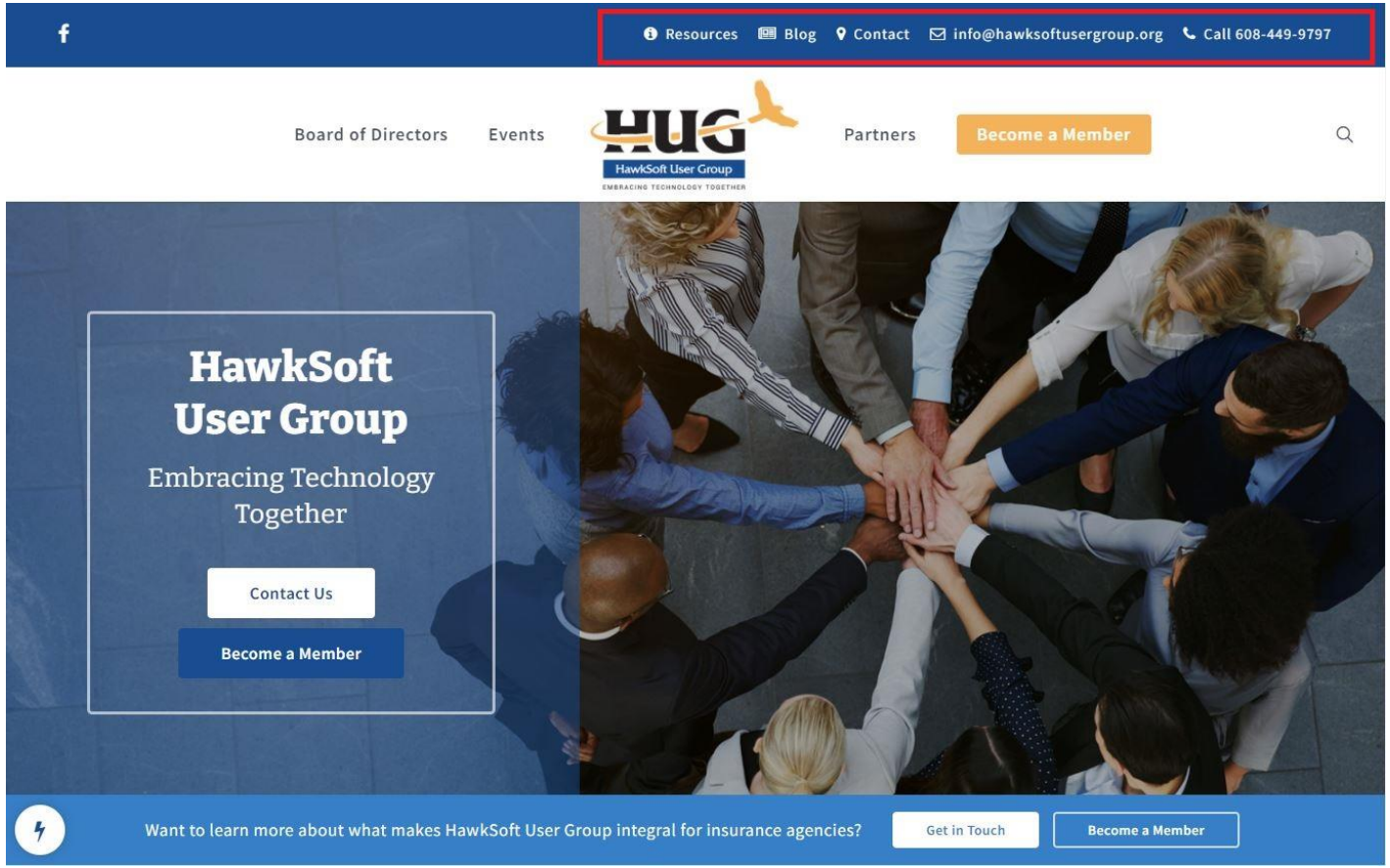
Jennifer Thompson
HUG | Webinars & Special Projects Manager
jennifer@hawksoftusergroup.org
Works from home in Wisconsin



info@hawksoftusergroup.org

HUG WEBSITE

http://hawksoftusergroup.org/



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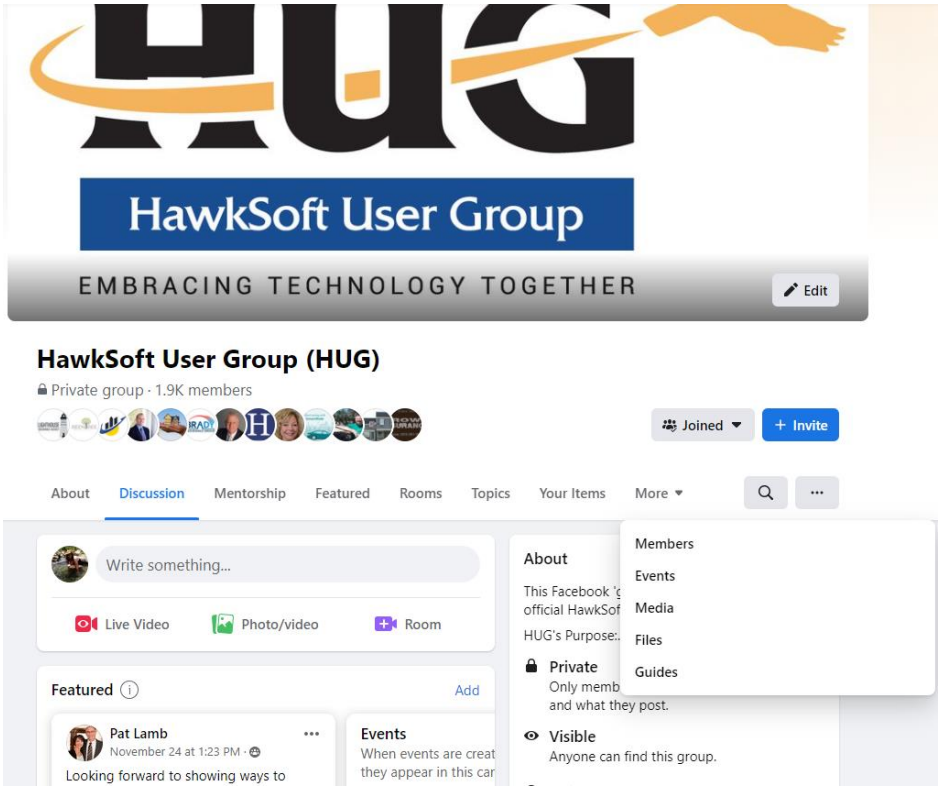
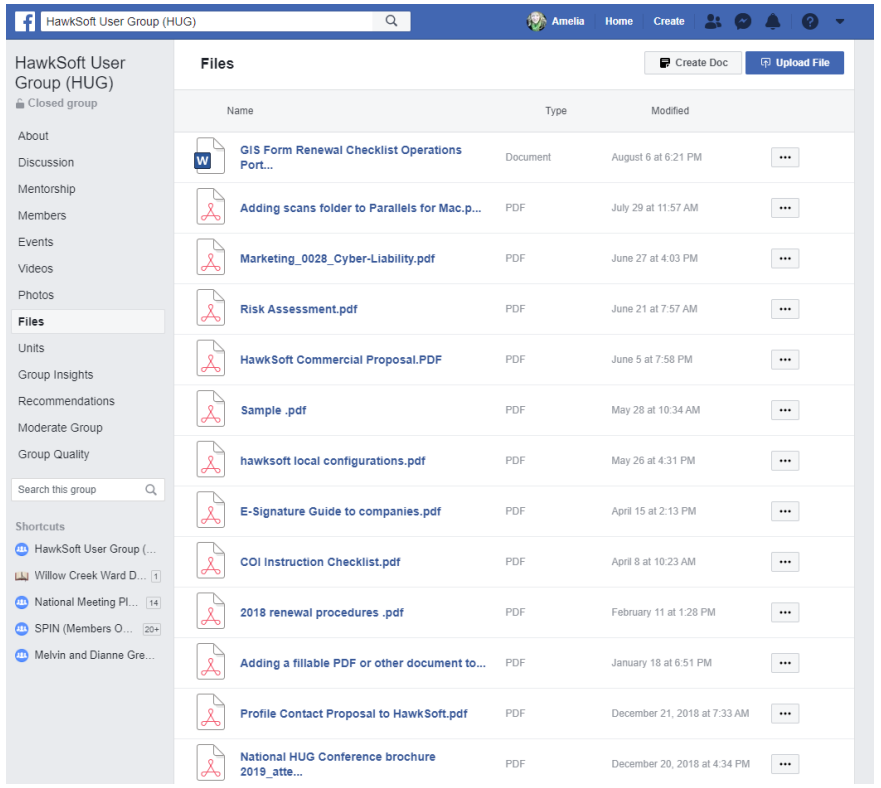
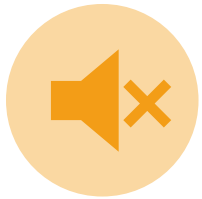






1 day pre-cruise event on land: https://www.eventbrite.com/e/2025-hawksoft-user-group-annual-national-conference-pre-cruise-event-tickets-1109424270859?aff=oddtdtcreator

HOUSEKEEPING



- During the webinar, participants will be muted. Please ask your questions using the Q & A feature, NOT the chat.



- If you are having difficulties hearing the speakers, consider calling in on the phone for the audio rather than listening via your computer.



- We are recording the webinar and you will be emailed a link to the recorded webinar within 24 hours.

Ashley Goins



Product Support Manager
agoins@hawksoft.com

Agenda

- Adding Users
- User Permissions
  - User Templates
- Tracking Only
- Update Producer, Agent of Record (AOR), and Customer Service Rep (CSR)
- Reassigning Tasks/Follow-Ups
- Removing/Reassigning Users

Adding Users

Adding a New User

A new user that needs to be added to HawkSoft. How do you get them added?

Seat Management

- The very first thing that needs to be done is making sure is that your agency has enough seats to support adding a new user.
- Seat management tells the system how many users can be logged in at one time.
  - Note: 🚫 Changing the number of seats licensed will impact the cost of your subscription to HawkSoft immediately.

Adding a New User - Continued

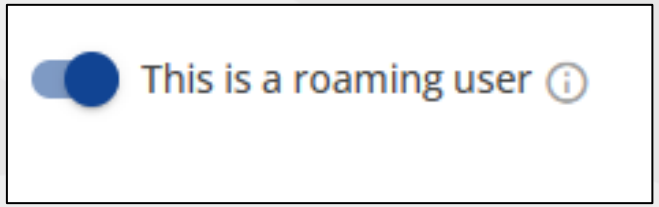
Agency Setup

- After the licensed seats have been increased (as needed), you will then go to the user tab in agency setup.
- Click “Add New User”, template selections will open.
- Select the desired template, if any, for the new user and click “Go”.
- Templates provide a base set of permissions based on the role of the new user.
- Begin entering the new user’s details.
- New feature: Send user an Invite Email with installation instructions.

Adding a New User - Continued

Offices

- Once at the offices section of adding a new user, there must be **at least 1 office** selected. If your agency has multiple offices, please select the offices that you wish to allow access to the PSR.
- If all offices, HawkSoft allows the user to be set as a Roaming User with the toggle at the bottom.



User Permissions

User Permission Templates

HawkSoft provides 3 Base Templates.

- These Base Templates are:
  - Bookkeeper
  - CSR/Producer
  - Manager
- Note: Base Templates cannot be edited.

Template Name	Description	Updated
Bookkeeper HawkSoft		8/22/2024 3:25:26 PM
CSR/Producer HawkSoft		8/22/2024 3:25:26 PM
Manager HawkSoft		8/22/2024 3:25:26 PM

User Permission Templates - Continued

The new user is created, but the agency would like to set a permission template for CSR's outside of the normal permissions. How can you create the template?

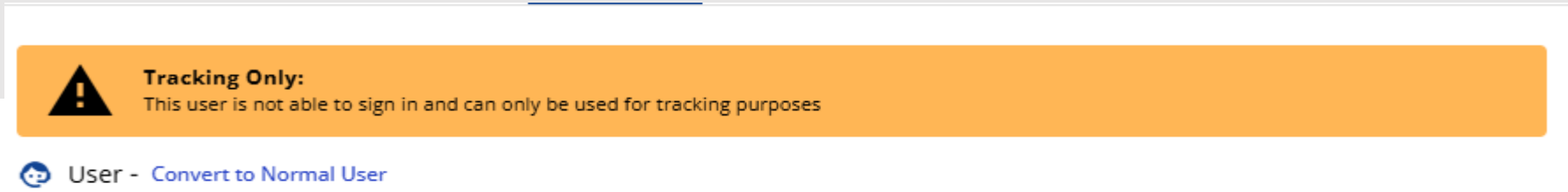
- Create a custom template for different roles and levels of users.
- Scenarios where this would be helpful:
  - Servicing Agent
  - Assistant
  - Front Desk Clerk
  - Any other role that is needed

Tracking Only

Tracking Only

Needing a user profile to make it easier to track commissions and/or sales purposes.

- HawkSoft enables you to create a user profile as a Commissions and Sales Tracking placeholder.
- Users marked as "**Tracking Only**" can be assigned to policies as Agents and assigned to clients as Producers/CSRs.
- These user can appear in reports but **cannot** log into HawkSoft.
- When adding a **Tracking Only** profile, notice that the permission tab is removed.
- New Feature: You are able to convert a Tracking Only User to a Normal User



Update Producer, AOR, and CSR

Update Producer, AOR, and CSR

Needing to make changes to a Producer, AOR, or CSR. The process has been simplified in HS6.

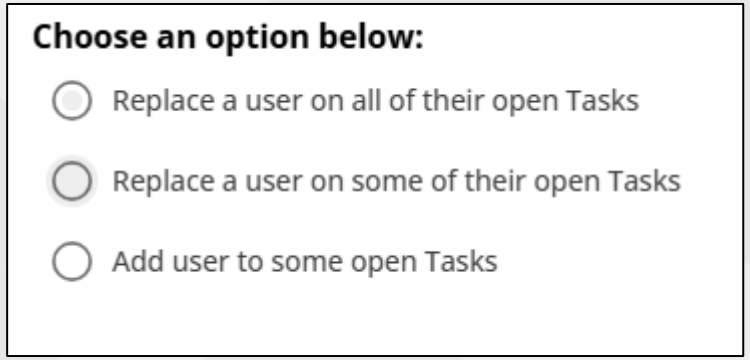
- First run the report that is needed to complete a data replace
  - Tip: If replacing multiple pieces of data, it is best to run a policy report
- Select the 3 dots in the upper right corner of the report and then select data replace
- Once the screen opens, you will be able to see all fields that are able to be replaced
- Select desired fields and select next. On the last screen HawkSoft gives the option to review and then select confirm
  - Note: Normally this is done instantly, but times may vary depending on the amount that is being replaced.

Reassigning Tasks

Reassigning Tasks

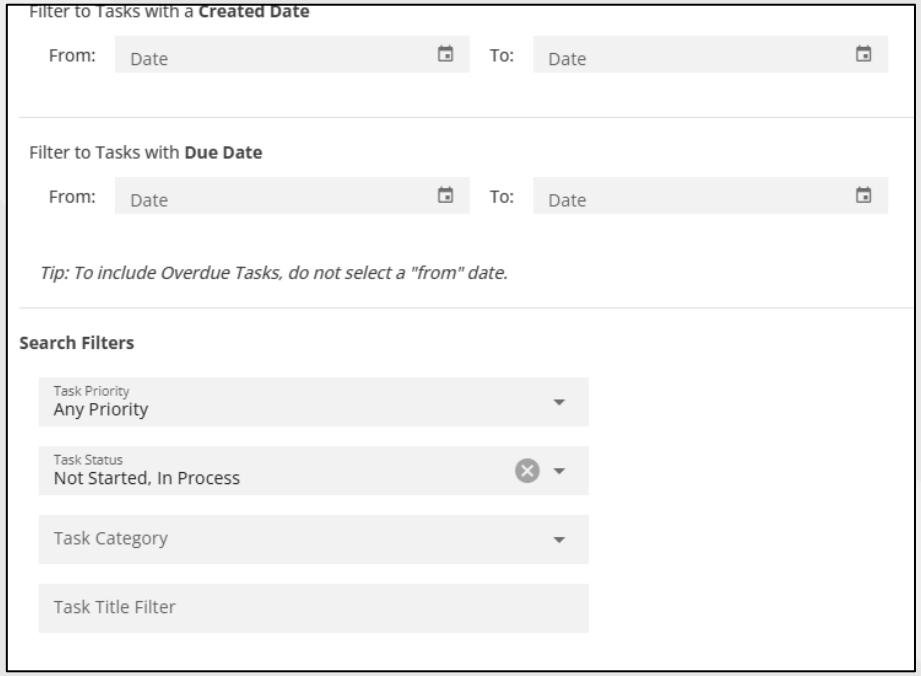
Needing to reassign tasks from one user to another. How do you reassign them?

- To being this process you will need to have permission to agency tasks.
- Open task center and go to agency tasks.
- Select the 3 dots in the upper right corner of task center and select reassign tasks.
- Now there are 3 options for reassigning.



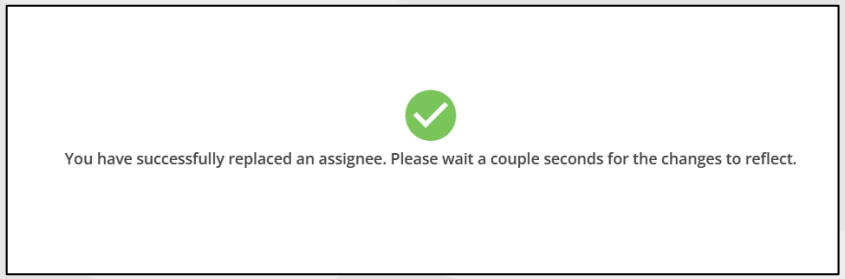
Reassigning Tasks - Continued

- Once the selection is made, press next.
- One the next screen, select the current assignee and the new assignee and select next.
- Now you see filter options



Reassigning Tasks - Continued

- Once the filter options have been completed, select search tasks; a list will be generated with the tasks meeting the previous criteria.
- Select the tasks that needs to be changed by using the checkbox to the left.
- Once all tasks that needs to be changed are selected, press save.
- A pop-up asking if you are sure that you want to replace assignee, press assign task.
- This will bring you to the end of the process saying that you have successfully replaced assignee, and you can close the page.



Removing/Inactivating a User

Removing/Inactivating a User

Needing to temporarily/permanently remove a user. What are your options?

- There may be times that it is necessary to mark a user as "**Inactive**" for different reasons.
- Some examples are:
  - Maternity Leave
  - Temp Position
  - User left the agency
- 🚫 HawkSoft recommends inactivating a user rather than deleting a user, except in special cases. Deleting a user can cause issues with your historical reports and should only be done for users who have never been assigned clients, policies, or Tasks. Special case example would be that you mistyped information.

Removing/Inactivating a User - Continued

- HawkSoft enables the option once the user is moved to inactive status, the agency can replace the user or remove the user if they are set as a default user to a particular office.
- If this is a temporary status, there is the availability to reactivate the user by using the toggle.

Resources/Help Articles

- Adding A New User
- User Profile Templates
- User Permissions
- Update Producer, AOR, CSR
- Reassigning Tasks
- Remove/Inactivate User

Q&A