

Installing the HawkSoft Desktop Application

This article is intended for new and existing users who wish to install HawkSoft on a Windows device.



See Solutions for Running HawkSoft 6 on a Mac if you are using a Mac.

Installing the HawkSoft desktop app enables you to access all HawkSoft features. You can also use HawkSoft Agent Portal to view clients and policies from mobile devices such as your phone or tablet, or visit HawkSoft in the Web for limited access, including Tasks, Reports, and more. For a breakdown of what features each version of HawkSoft provides, see Feature Access.

HawkSoft provides a silent install option for IT teams to manage installation without user input. For more information, contact Product Support.



In order for HawkSoft to perform essential functions, all workstations for the agency need to have access to the following HawkSoft domains:

- *.hawksoft.com
- *.hawksoft.cloud
- *.hawksoft.app
- *.userpilot.io

See HawkSoft Server List for IP Allow for more information.

Before you Begin (Required Information)

To set up HawkSoft on a new workstation, you will need four things:

- Your agency ID: This number tells HawkSoft which agency you are with.
- Your HawkSoft User Initials: Your three-letter username. This is usually your initials.
- Your HawkSoft password: This may be a permanent password you have created, or a temporary password provided by your HawkSoft administrator.

- Access to your primary work email account: HawkSoft will email a verification code the first time you log in to HawkSoft. In addition, if your agency has enabled Multi-Factor Authentication (MFA), then HawkSoft will periodically email you an authorization code.

If you are missing any of this information, please contact your agency administrator.

To install the HawkSoft Desktop App

The following steps will guide you through the installation of HawkSoft on your local device.

1. Download the HawkSoft installer to your workstation from our website: <https://www.hawksoft.com/support/download-app/>
Your browser may ask you where to save the file.
2. Run the installation file by double-clicking on it in your local files.
3. Enter your **Agency ID**, **User Initials**, and **Password**.
4. Check **Create Shortcut on Desktop** and **Launch HawkSoft when Finished**, then click **Install**.

Wait for the installation to complete.

5. Log in using your **User Initials** and **Password**.

The HawkSoft desktop application will open to the Start page.

For more information about logging in and Multi-Factor Authentication, see Logging In and Out of HawkSoft.

To uninstall the HawkSoft Desktop App

When you no longer need HawkSoft installed on a workstation, you can run our uninstaller.

1. Close all instances of HawkSoft.
2. Double-click on the HawkSoft desktop icon.

The HawkSoft Login window will appear.

3. Click **Uninstall**, at the bottom of the login window.

The Uninstall dialog will open.

4. Click **Uninstall HawkSoft**.

You will receive a confirmation message when HawkSoft finishes uninstalling.
