

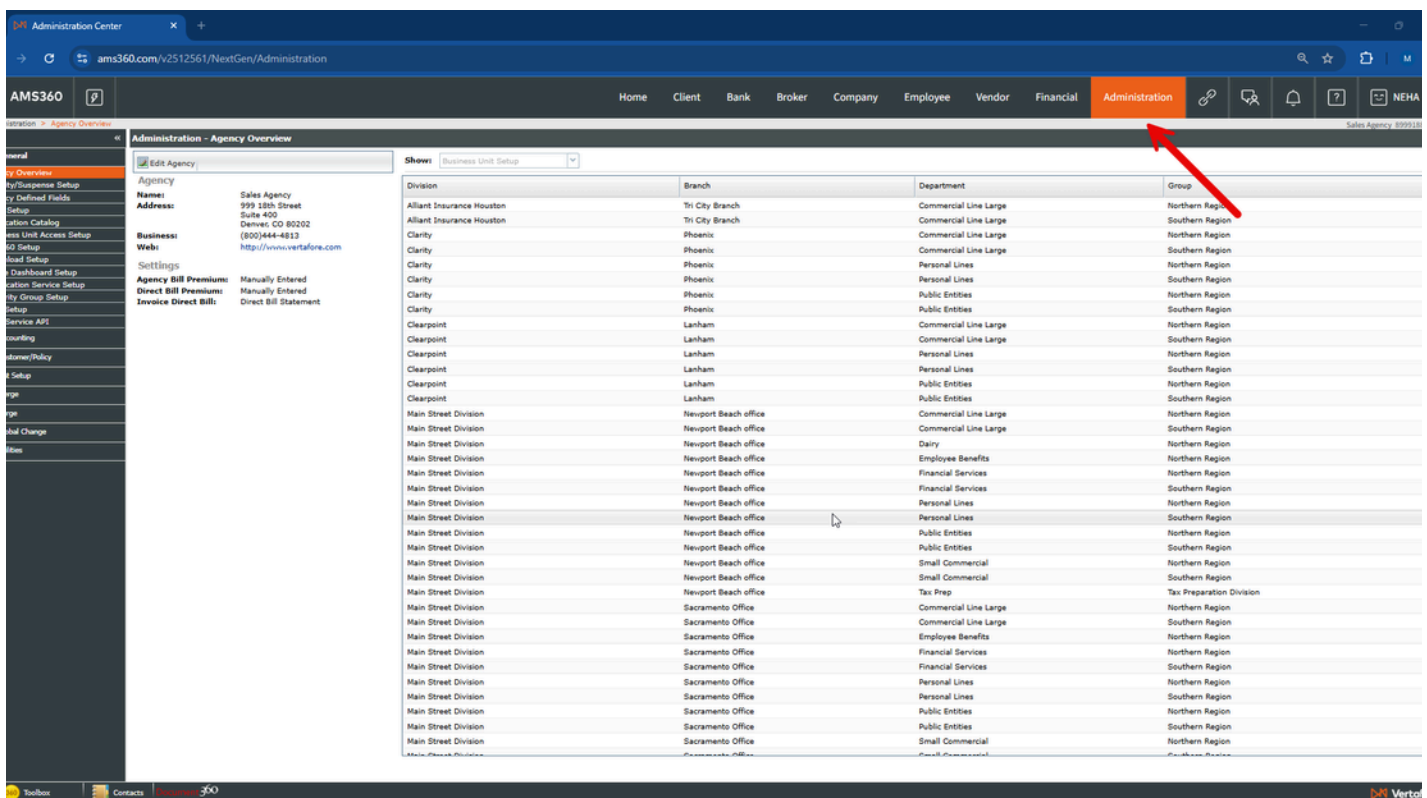
AMS360 v2 Integration for New Customer

*What's Needed to be successful?

1. Admin in AMS360
2. Admin in Bridge
3. Know the agency code
4. Integration has been changed by TRG

Step 1 - Go to AMS360.com

Step 2 - Click on Administration tab in AMS360



The screenshot shows the AMS360 Administration Center interface. The top navigation bar includes tabs for Home, Client, Bank, Broker, Company, Employee, Vendor, Financial, and Administration. The Administration tab is highlighted. A red arrow points to the Administration tab. The left sidebar shows the 'Application Catalogue' under the 'Agency Overview' section. The main content area displays a table of agency information, including Division, Branch, Department, and Group.

Division	Branch	Department	Group
Alliant Insurance Houston	Tri City Branch	Commercial Line Large	Northern Region
Alliant Insurance Houston	Tri City Branch	Commercial Line Large	Southern Region
Clarity	Phoenix	Commercial Line Large	Northern Region
Clarity	Phoenix	Commercial Line Large	Southern Region
Clarity	Phoenix	Personal Lines	Northern Region
Clarity	Phoenix	Personal Lines	Southern Region
Clarity	Phoenix	Public Entities	Northern Region
Clarity	Phoenix	Public Entities	Southern Region
Clearpoint	Lanham	Commercial Line Large	Northern Region
Clearpoint	Lanham	Commercial Line Large	Southern Region
Clearpoint	Lanham	Personal Lines	Northern Region
Clearpoint	Lanham	Personal Lines	Southern Region
Clearpoint	Lanham	Public Entities	Northern Region
Clearpoint	Lanham	Public Entities	Southern Region
Main Street Division	Newport Beach office	Commercial Line Large	Northern Region
Main Street Division	Newport Beach office	Commercial Line Large	Southern Region
Main Street Division	Newport Beach office	Dairy	Northern Region
Main Street Division	Newport Beach office	Employee Benefits	Northern Region
Main Street Division	Newport Beach office	Financial Services	Northern Region
Main Street Division	Newport Beach office	Financial Services	Southern Region
Main Street Division	Newport Beach office	Personal Lines	Northern Region
Main Street Division	Newport Beach office	Personal Lines	Southern Region
Main Street Division	Newport Beach office	Public Entities	Northern Region
Main Street Division	Newport Beach office	Public Entities	Southern Region
Main Street Division	Newport Beach office	Small Commercial	Northern Region
Main Street Division	Newport Beach office	Small Commercial	Southern Region
Main Street Division	Newport Beach office	Tax Prep	Tax Preparation Division
Main Street Division	Sacramento Office	Commercial Line Large	Northern Region
Main Street Division	Sacramento Office	Commercial Line Large	Southern Region
Main Street Division	Sacramento Office	Employee Benefits	Northern Region
Main Street Division	Sacramento Office	Financial Services	Northern Region
Main Street Division	Sacramento Office	Financial Services	Southern Region
Main Street Division	Sacramento Office	Personal Lines	Northern Region
Main Street Division	Sacramento Office	Personal Lines	Southern Region
Main Street Division	Sacramento Office	Public Entities	Northern Region
Main Street Division	Sacramento Office	Public Entities	Southern Region
Main Street Division	Sacramento Office	Small Commercial	Northern Region
Main Street Division	Sacramento Office	Small Commercial	Southern Region

Step 3 - Click Application Catalogue on left hand side

Administration - Agency Overview

Agency Details:

- Name: Sales Agency
- Address: 999 18th Street, Suite 400, Denver, CO 80202
- Web: http://www.vertafore.com
- Settings: Manually Entered
- Agency Bill Premiums: Manually Entered
- Direct Bill Premiums: Manually Entered
- Invoice Direct Bill: Direct Bill Statement

Division	Branch	Department	Group
Alliant Insurance Houston	Tri City Branch	Commercial Line Large	Northern Region
Alliant Insurance Houston	Tri City Branch	Commercial Line Large	Southern Region
Clarity	Phoenix	Commercial Line Large	Northern Region
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Main Street Division	Sacramento Office	Public Entities	Southern Region
Main Street Division	Sacramento Office	Small Commercial	Northern Region
Main Street Division	Sacramento Office	Small Commercial	Southern Region

Step 4 - Locate Bridge and Subscribe

Application Catalog

Application Name	Application Provider	Description	Application Keys	
Bridge	Bridge	Bridge	1	Edit
Zywave Account and Contact Integration	Zywave	Account and contact data in AMS360 continually syncs with Zywave, powering workflows across the two applications.	7	Edit

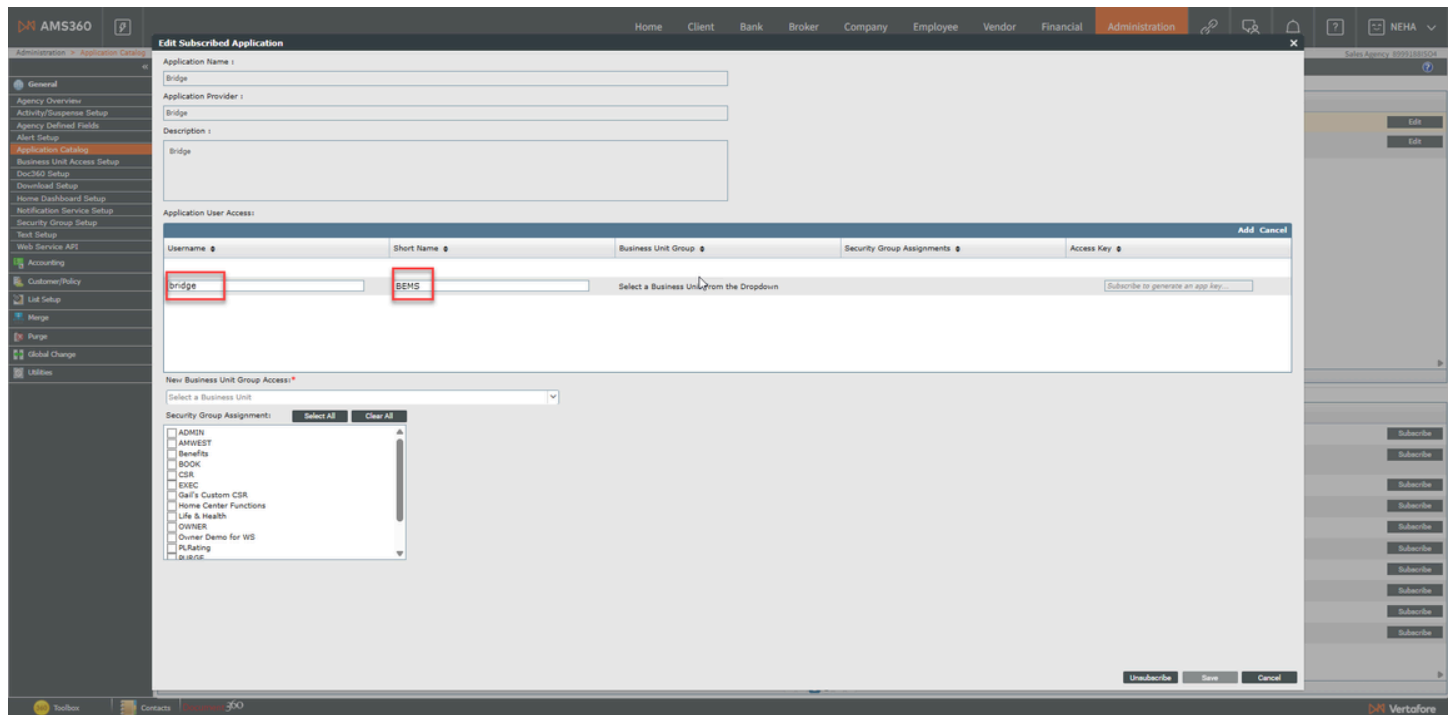
1 of 1

Application Name	Application Provider	Description	
OPP Test Four	Orange Partner in Test 4	New Orange Partner Coming Soon!!	Subscribe
Adapt API	Adapt API	Adapt bridges servicing data directly from carriers, pulling non-download documents and notifications into AMS360 automatically	Subscribe
Signiton Partner App	Signiton	Application from Signiton	Subscribe
OPP Test Two	Orange Partner in Test 2	New Orange Partner Coming Soon!!	Subscribe
Pay My Premiums	AFCD	AFCD Premium Finance Company Integration	Subscribe
Agency Revolution - EMS	Agency Revolution	Agency Revolution - EMS	Subscribe
OPP Test Three	Orange Partner in Test 3	New Orange Partner Coming Soon!!	Subscribe
Bridge	Bridge		Subscribe
Simply Easier Payments	Simply Easier Payments	Digital Payment Solution	Subscribe
OPP Test Seven	Orange Partner in Test 7	Application for Orange Partner	Subscribe

1 of 2

Step 5 - Set Username & Shortname

- Username = bridge
- Shortname = BEMS



Step 6 - Locate New Business Unit Group Access

- Select Div:(All)

AMS360

Administration > Application Catalog

General

Agency Overview

Activity/Suspense Setup

Agency Defined Fields

Alert Setup

Application Catalog

Business Unit Access Setup

Doc360 Setup

Download Setup

Home Dashboard Setup

Notification Service Setup

Security Group Setup

Text Setup

Web Service API

Accounting

Customer/Policy

List Setup

Merge

Purge

Global Change

Utilities

Edit Subscribed Application

Application Name :
Bridge

Application Provider :
Bridge

Description :
Bridge

Application User Access:

Username

Short Name

bridge

BEMS

New Business Unit Group Access:*

Div: (All), Branches: 12, Dept: (All), Group: (All)

Security Group Assignment:

Select All

Clear All

ADMIN

AMWEST

Benefits

BOOK

CSR

EXEC

Gail's Custom CSR

Home Center Functions

Life & Health

OWNER

Owner Demo for WS

PLRating

PURGE

Toolbox

Contacts

Document360

Step 7 - Select All

AMS360

Administration > Application Catalog

General

Agency Overview

Activity/Suspense Setup

Agency Defined Fields

Alert Setup

Application Catalog

Business Unit Access Setup

Doc360 Setup

Download Setup

Home Dashboard Setup

Notification Service Setup

Security Group Setup

Text Setup

Web Service API

Accounting

Customer/Policy

List Setup

Merge

Purge

Global Change

Utilities

Edit Subscribed Application

Application Name :
Bridge

Application Provider :
Bridge

Description :
Bridge

Application User Access:

Username	Short Name
bridge	BEMS

New Business Unit Group Access:*

Div: (All), Branches: 12, Dept: (All), Group: (All)

Security Group Assignment: Select All Clear All

- ☒ ADMIN
- ☒ AMWEST
- ☒ Benefits
- ☒ BOOK
- ☒ CSR
- ☒ EXEC
- ☒ Gail's Custom CSR
- ☒ Home Center Functions
- ☒ Life & Health
- ☒ OWNER
- ☒ Owner Demo for WS
- ☒ PLRating
- ☒ PURGE

360 Toolbox | Contacts | Document 360

Step 8 - Click Add

Notification Service Setup

OData Security Manager

Security Group Setup

Text Setup

Web Service API

Accounting

Customer/Policy

List Setup

Field Importance Setup

Merge

Global Change

Utilities

Application User Access:

Username	Short Name	Business Unit Group	Security Group Assignments	Access Key	
Bridge	BEMS	Select a Business Unit From the Dropdown		Subscribe to generate an app key...	Add Cancel

New Business Unit Group Access:*

Div: (All), Dept: (All) - Emp: ADMIN

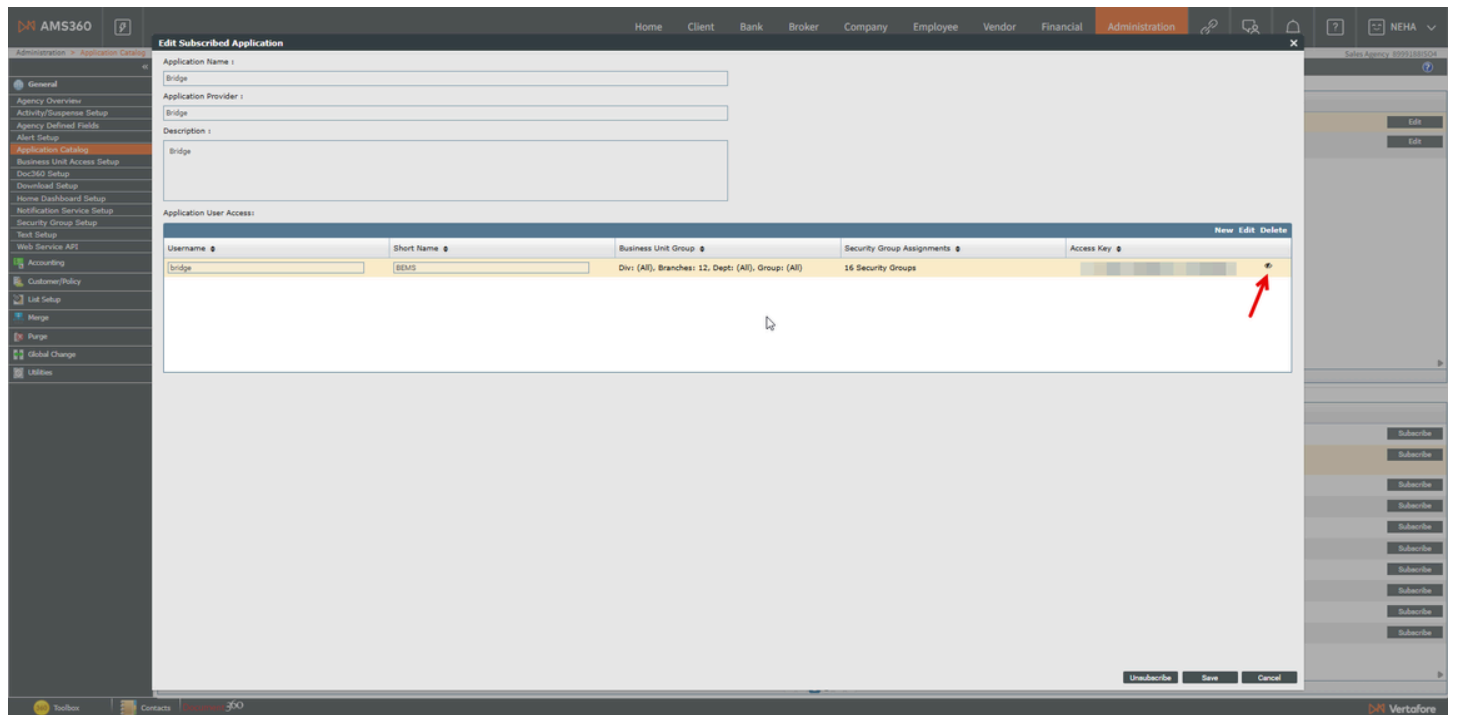
Security Group Assignment: Select All Clear All

- ☒ ADMIN
- ☒ Append Access
- ☒ Benefits
- ☒ BOOK

Subscribe Cancel

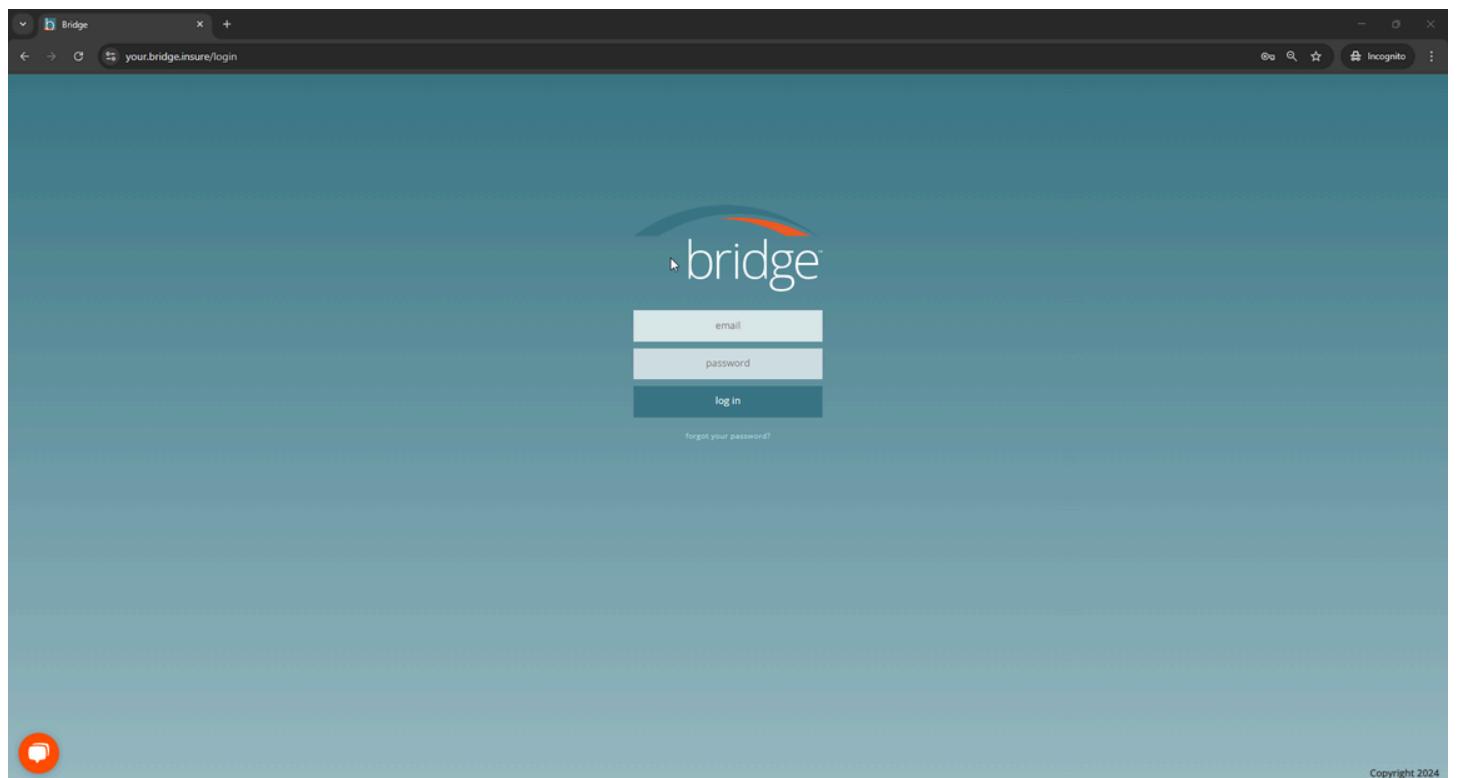
Step 9 - Click the eyeball to show Access Key

- The below image has been blurred as this is sensitive information

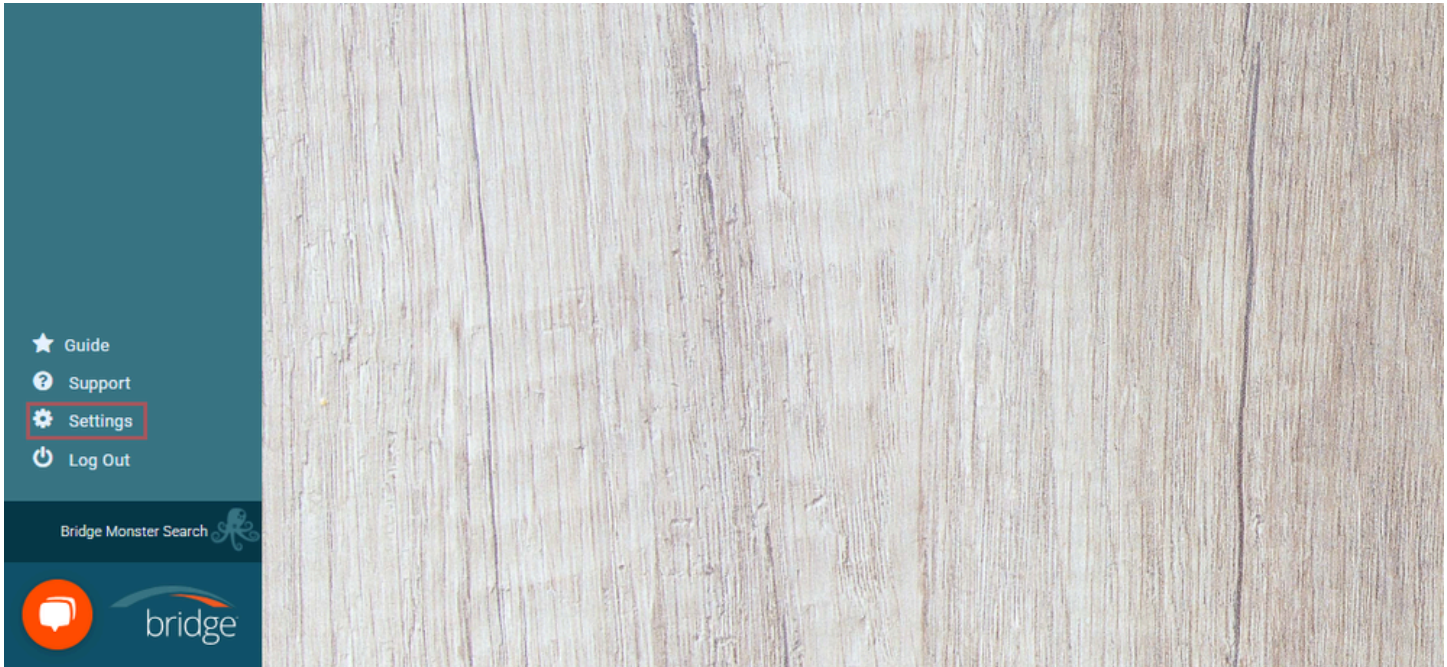


Step 10 - Click Save

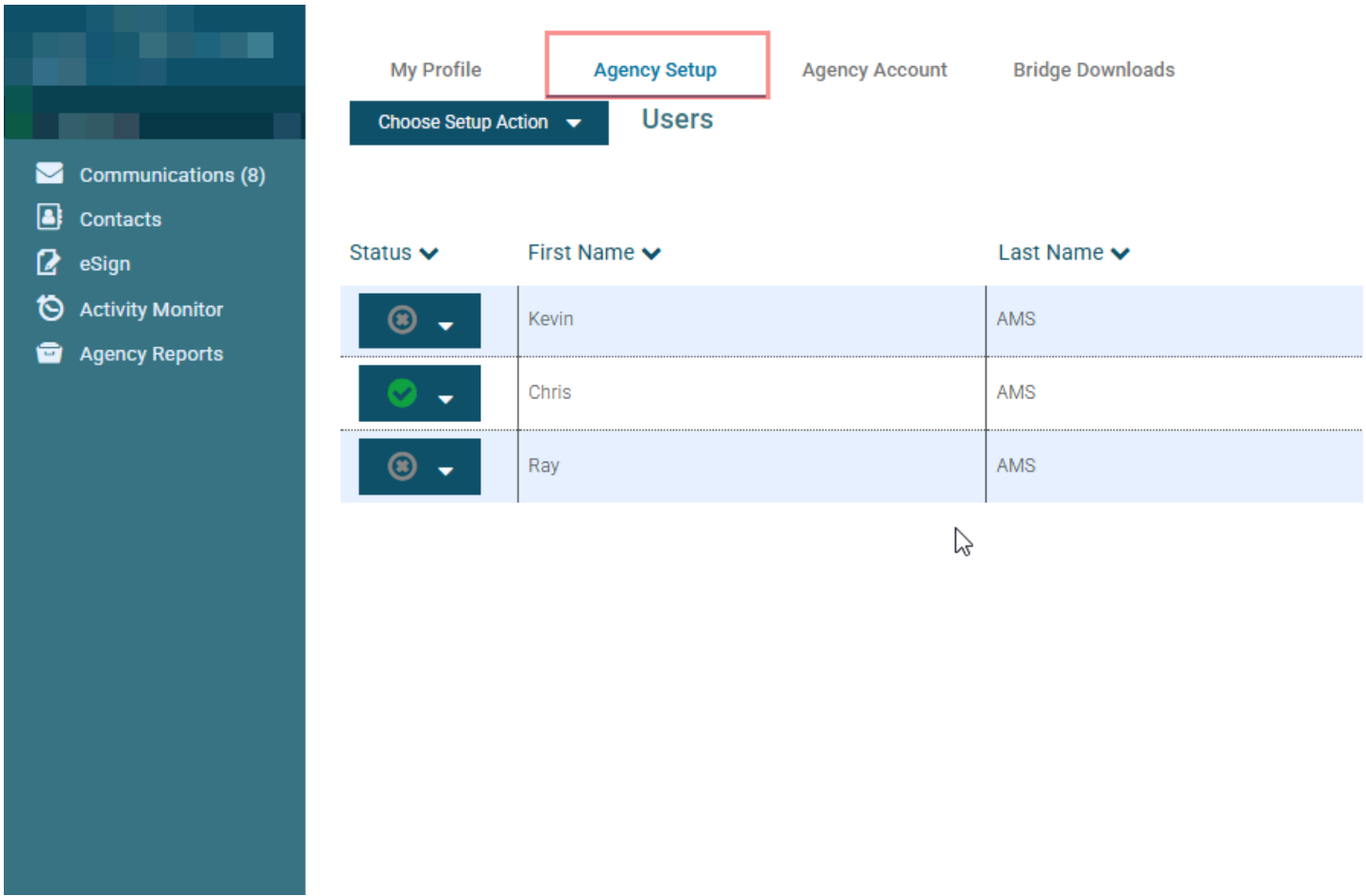
Step 11 - Go to your.bridge.insure and sign in



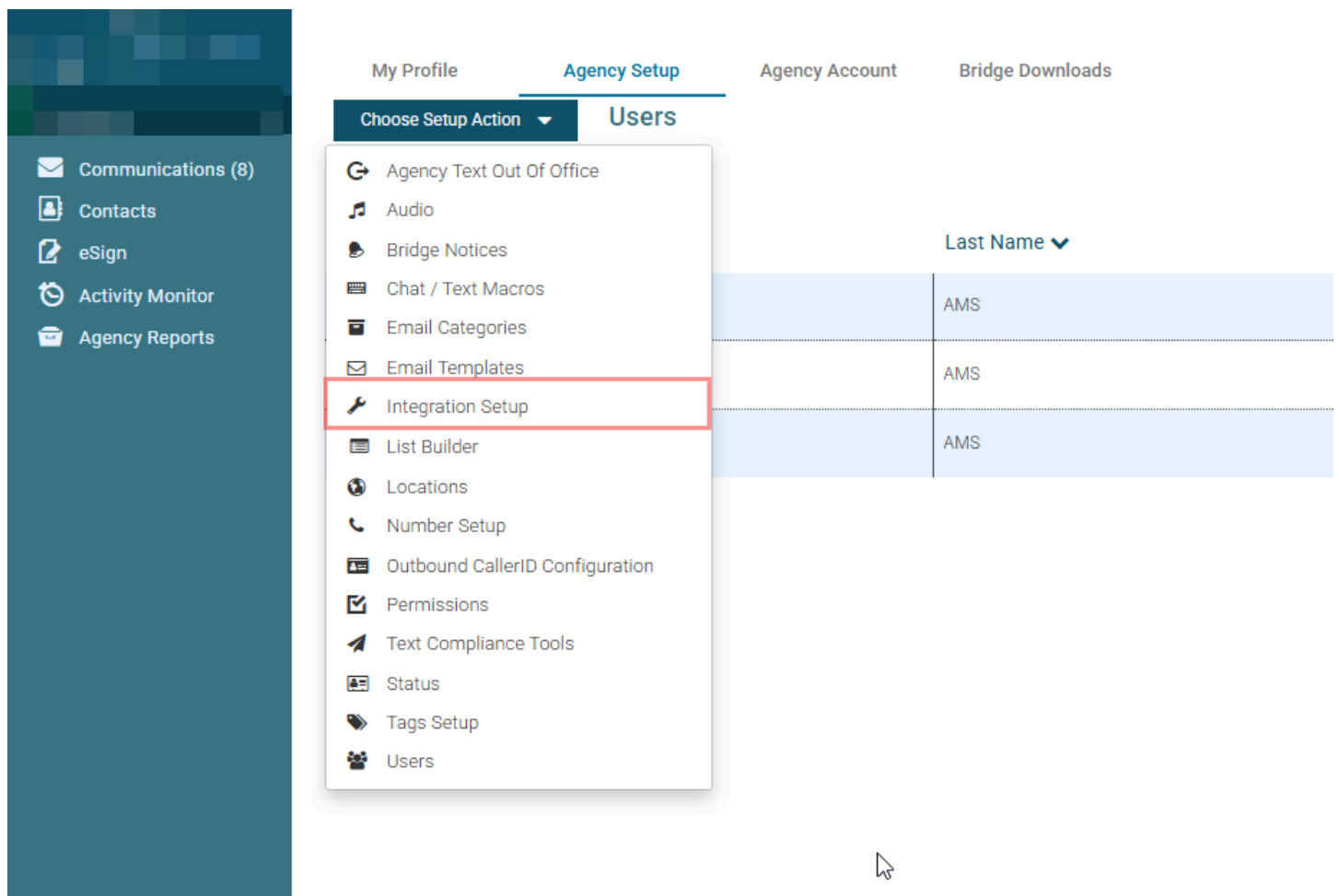
Step 12 - Click on Settings on the bottom left



Step 13 - Select Agency Setup

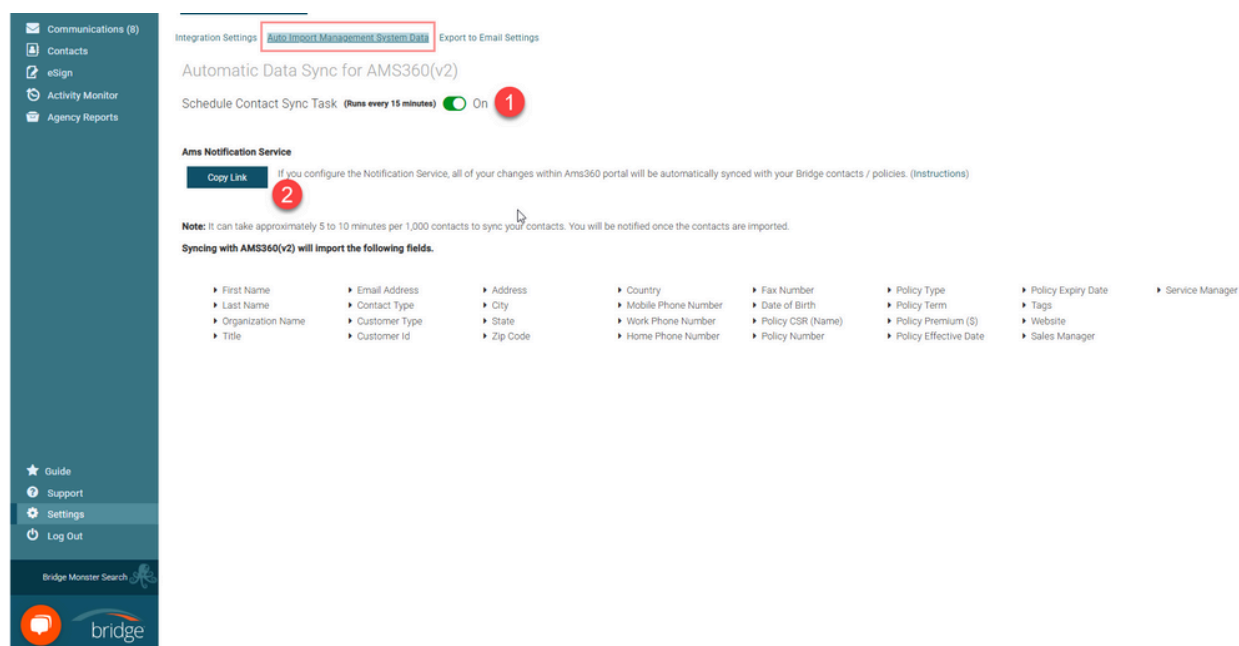


Step 14 - Select Choose Setup Action



Step 15 - Select Auto Import Management System Data tab

1. Toggle on “Schedule Contact Sync task”
2. Click Copy Link
3. Go back to AMS360



Step 16 - Click on Notification Service Setup on the left

The screenshot shows the AMS360 Application Catalog interface. The left sidebar contains a list of navigation items, with 'Notification Service Setup' highlighted and a red arrow pointing to it. The main area displays two tables of application data.

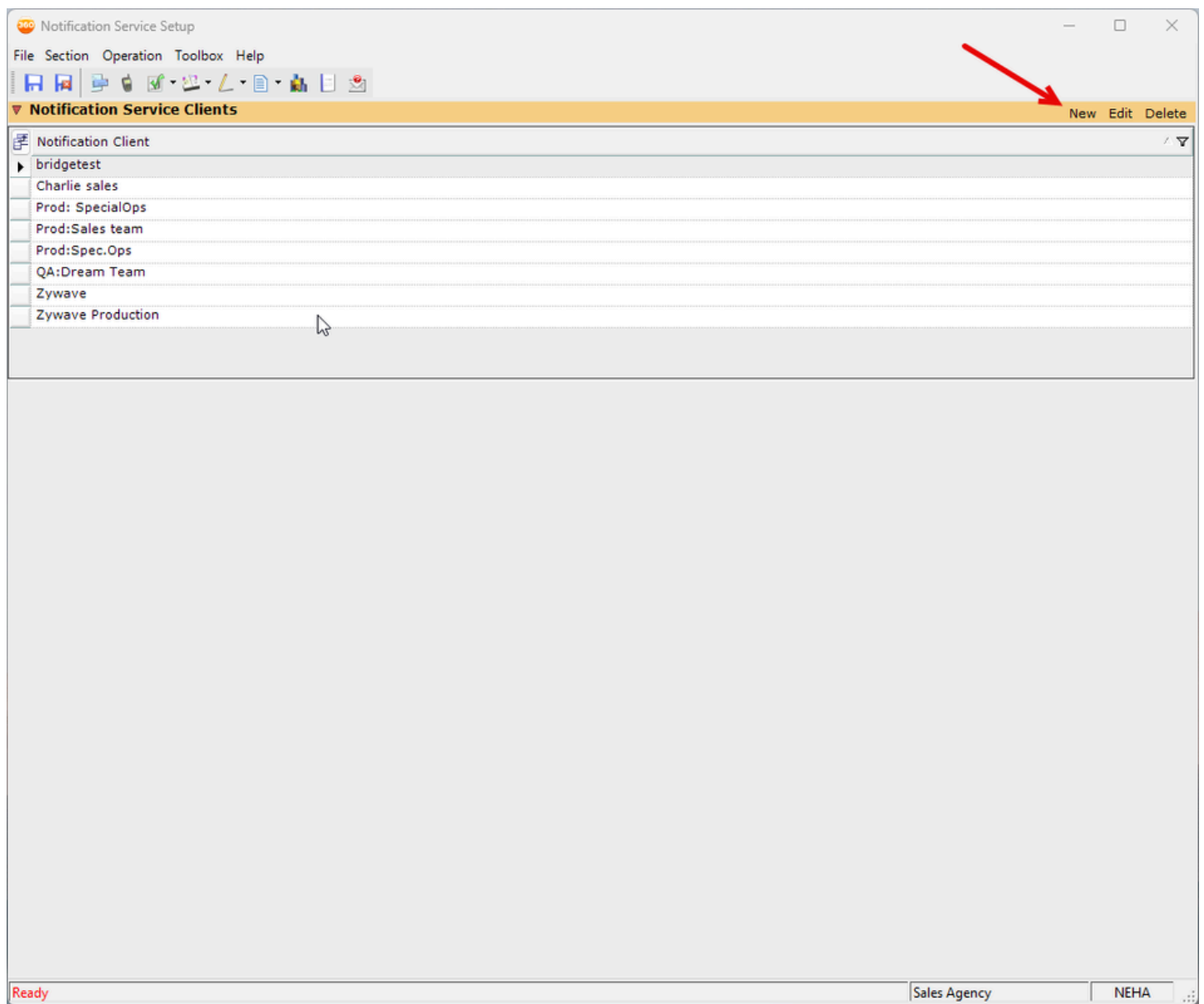
Table 1: Application Catalog

Application Name	Application Provider	Description	Application Keys	
Bridge	Bridge	Bridge	1	Edit
Zywave Account and Contact Integration	Zywave	Account and contact data in AMS360 continually syncs with Zywave, powering workflows across the two applications.	7	Edit

Table 2: Application Catalog

Application Name	Application Provider	Description	
ODP Test Four	Orange Partner in Test 4	New Orange Partner Coming Soon!!	Subscribe
Adapt	Adapt API	Adapt bridges servicing data directly from carriers, pulling non-download documents and notifications into AMS360 automatically	Subscribe
ODP Test Two	Orange Partner in Test 2	New Orange Partner Coming Soon!!	Subscribe
Pay My Premiums	APCO	APCO Premium Finance Company Integration	Subscribe
Signiton Partner App	Signiton	Application from Signiton	Subscribe
Agency Revolution - EMS	Agency Revolution	Agency Revolution - EMS	Subscribe
Ascend	Ascend	Digital payment solution	Subscribe
ODP Test Three	Orange Partner in Test 3	New Orange Partner Coming Soon!!	Subscribe
Simply Easier Payments	Simply Easier Payments	Digital Payment Solution	Subscribe
ePayPolicy	ePayPolicy	Digital Payment Solution	Subscribe

Step 17 - Select New



Step 18 - Notification Client

- Set as Bridge Integration

Notification Service Setup

File Section Operation Toolbox Help

Notification Service Clients Add Cancel

Notification Client

bridgetest

Charlie sales

Prod: SpecialOps

Prod:Sales team

Prod:Spec.Ops

QA:Dream Team

Zywave

Zywave Production

Notification Client: Bridge Integration

Contacts New Edit Delete

Name	Title	Bus Phone	Bus Ext	Cell Phone	Cell Ext	Email	Addr 1	Addr 2	City	State	Zip
*											

Recipient Information New Edit Delete

Name	Destination Address	Version	Primary Contact	Delivery Status

Ready Sales Agency NEHA

Step 19 - Click New (contacts)

Notification Service Setup

File Section Operation Toolbox Help

Notification Service Clients Add Cancel

Notification Client

bridgetest
 Charlie sales
 Prod: SpecialOps
 Prod:Sales team
 Prod:Spec.Ops
 QA:Dream Team
 Zywave
 Zywave Production

Notification Client: Bridge Integration

Contacts New Edit Delete

Name	Title	Bus Phone	Bus Ext	Cell Phone	Cell Ext	Email	Addr 1	Addr 2	City	State	Zip
*											

Recipient Information New Edit Delete

Name	Destination Address	Version	Primary Contact	Delivery Status

Sales Agency NEHA

Step 19 - Enter Contact Name

- Type “Bridge IntetrationContact
- Click add to save Bridge IntegrationContact

Notification Service Setup

File Section Operation Toolbox Help

Notification Service Clients Add Cancel

Notification Client

bridgetest
Charlie sales
Prod: SpecialOps
Prod:Sales team
Prod:Spec.Ops
QA:Dream Team
Zywave
Zywave Production

Notification Client: Bridge Integration

Contacts Add Cancel

Name	Title	Bus Phone	Bus Ext	Cell Phone	Cell Ext	Email	Addr 1	Addr 2	City	State	Zip

Name: Bridge IntegrationContact Address:

Title:

Business: Ext: City: State:

Cell: Ext: Zip:

Email:

Recipient Information New Edit Delete

Name	Destination Address	Version	Primary Contact	Delivery Status

Sales Agency NEHA

Step 20 - Click New (Recipient)

Notification Service Setup

File Section Operation Toolbox Help

Notification Service Clients Add Cancel

Notification Client

bridgetest
Charlie sales
Prod: SpecialOps
Prod:Sales team
Prod:Spec.Ops
QA:Dream Team
Zywave
Zywave Production

Notification Client: Bridge Integration

Contacts New Edit Delete

Name	Title	Bus Phone	Bus Ext	Cell Phone	Cell Ext	Email	Addr 1	Addr 2	City	State	Zip
*											

Recipient Information New Edit Delete

Name	Destination Address	Version	Primary Contact	Delivery Status

Sales Agency NEHA

Step 21 - Recipient Details

1. Enter "Bridge Recipeint" for Recipient Name
2. You will paste the copied link from the 2nd step in Step 15
 - i. Please note that the link will look like this
 - a. <https://blue.api4.bridge.insure/ams360/notification/d466ae63-f674-4691-b3fc-98df15f5d926>
 - b. You will need to delete blue. or green. so that it will look like this -
<https://api4.bridge.insure/ams360/notification/d466ae63-f674-4691-b3fc-98df15f5d926>
3. Change Notification version to 2.0
4. Retry Method set as Single Retry
5. Status - from the drop down, select ON
6. Grant Notifications - manually select all check boxes
7. Click add to save Recipient details
8. Save and Close to save all of your work

Notification Service Setup

File Section Operation Toolbox Help

QA Team
Zywave
Zywave Production

Notification Client: Bridge Integration

Contacts New Edit Delete

Name	Title	Bus Phone	Bus Ext	Cell Phone	Cell Ext	Email	Addr 1	Addr 2	City	State	Zip
*											

Recipient Information Add Cancel

Name	Destination Address	Version	Primary Contact	Delivery Status

Recipient Name:

Destination Address:

Authentication Code:

Notification Version: 1.0

Retry Method: Single Retry

Primary Contact:

Backup Contact:

Delivery Status:

Status:

Note: In order for Notifications to be delivered, the Status must be set to "On".

Notification Types

Notification Type	Grant Notification
Broker	☐
Company	☐
Customer	☐
CustomerServiceGroupPersonnel	☐
Employee	☐
GLBranch	☐
GLDepartment	☐
GLDivision	☐
GLGroup	☐
LineOfBusiness	☐

Sales Agency NEHA

Step 22 - Get the version number

- The version number of your AMS360 account is in the URL
- Highlight it and copy it

Administration > Application Catalog

Application Catalog

Application Name	Application Provider	Description
Bridge	Bridge	Bridge
Zywave Account and Contact Integration	Zywave	Account and contact data in AMS360 continually syncs with Zywave two applications.

Step 23 - Go to integrations setting in Bridge (refer to Step 12)

1. Copy your application key (Step
2. Enter your agency code (IF your agency has a hyphen + a number, please enter it)
3. Enter your version number
4. Toggle on Automatic Exports
5. Click update settings

Chris AMS
CA
Direct (470) 207-2239
Ext 105

Available

Communications (8)

Contacts

eSign

Activity Monitor

Agency Reports

★ Guide

🔍 Support

⚙️ Settings

🔌 Log Out

Bridge Monster Search



My Profile **Agency Setup** Agency Account Bridge Downloads

Choose Setup Action

Integration Setup

[Integration Settings](#) Auto Import Management System Data Export to Email Settings

Agency Setup for AMS360(v2) Integration

Management System

Select a Management System

AMS360(v2)

Application Key

Enter Application Key

Agency Code

Enter Agency Code

Version

Enter DB Version

v2512561

Automatic Exports

Enabled

Update Settings