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

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Step 3 - Click Application Catlogue on left hand side

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Step 4 - Locate Bridge and Subscribe

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Step 5 - Set Username & Shortname

- Username = bridge
- Shortname = BEMS

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Step 6 - Locate New Business Unit Group Access

• Select Div:(All)

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Step 7 - Select All

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Step 8 - Click Add

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Step 9 - Click the eyeball to show Access Key

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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

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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

Settings
 Log Out

bridg

3. Go back to AMS360



Step 16 - Click on Notification Service Setup on the left

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Step 17 - Select New

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Step 18 - Notification Client

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Step 19 - Click New (contacts)

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Step 19 - Enter Contact Name

- Type "Bridge IntetrationContactClick add to save Bridge IntegrationContact

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Step 20 - Click New (Recipient)

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Step 21 - Recipient Details

- 1. Enter "Bridge Recipeint" for Recipient Name
- 2. You will paste the copied link from the 2^{nd} step in Step 15
 - i. Please note that the link will look like this
 - a. <u>https://blue.api4.bridge.insure/ams360/notification/d466ae63-f674-4691-b3fc-98df15f5d926</u>
 - b. You will need to delete <u>blue.</u> or <u>green.</u> so that it will look like this -<u>https://api4.bridge.insure/ams360/notification/d466ae63-f674-4691-b3fc-</u> <u>98df15f5d926</u>
- 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

Construction Service Setup		-		×
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Notification Version: 1.0 V O delivered, the Status must be set to "On".				
Retry Method: Single Retry				
Primary Contact:				
Backup Contact:				
V Notification Types				
Notification Type	Grant Notification	6	V	
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Step 22 - Get the version number

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

Administration Center	× b Bridge	× +	
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M AMS360 🖗			Home Client B
Administration > Application Catalog			
**	Application Catalog		
🍈 General			
Agency Overview	Application Name	Application Provider 🗢	Description 🖨
Activity/Suspense Setup			
Agency Defined Fields	Bridge	Bridge	Bridge
Alert Setup Application Catalog	Zywave Account and Contact Integration	Zywave	Account and contact data in AMS360 continually syncs with Zywa
Business Unit Access Setup			two applications.
Doc360 Setup			
Download Setup			
Home Dashboard Setup			
Notification Service Setup			
Security Group Setup			
Text Setup			
Accounting			
Lustomer/Policy			
🔐 List Setup			
👎 Merge			
🔯 Purge			
Global Change	4		
🔯 Utilities	7		

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 hypen + a number, please enter it)
- 3. Enter your version number
- 4. Toggle on Automatic Exports
- 5. Click update settings

Chris AMS C A Direct (470) 207-2239 Evt 105	My Profile	Agency Setup	Agency Account	Bridge Downloads	
 ✓ Available 	Choose Setup Action	 Integration 	n Setup		
Communications (8) Contacts C eSign Activity Monitor	Integration Settings Aut	o Import Management Sy) for AMS360(v	stem Data Export to En (2) Integration	nail Settings	
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Step 24 - Chat with Bridge Support to begin the contact sync for your agency.