# AMS360 v2 Migrating Customer

Step 1 - Go to TRG & search for agency



## Step 2 - Emulate as Redcliffe Tech

Michael Tucker Const (470) 207-9120 • Available • Communications Contacts Sales Automation	My Profile	Agency Setup Age	ncy Account Bridge Notices	TRG Admin	Agency Admin sword <b>4</b> Hard	Order Management tware Offerings	Bridge Downle	BCA Insura	bspot Mapped	Disabled Only 🗌 Ac	tive Only 2.0 Only
esign     Video     Documents     To Do     Activity Monitor	Primary Contact Information Domain UUID: 280ex497.4c64.3cc2.65ce.df50ef15o314.@p										
<ul> <li>Bridge Proposals</li> <li>Agency Reports</li> <li>Secret Feature</li> </ul>	Company Name BCA Insurance Group Dave Migration Step 2 Completed: N Feb 8, 2023 818 arr	DAVE Server Dave: blucom.yourblu	sewave.com	Bridge Tech Use	er iffe.tech 🕢 Emulate in	Dave	Group Code Bridge10	Package Ultimate	Active Users	Disabled Users	Hubspot ID 9455512104
★ Guide ♥ Support	Api Integration AMS360 Sym NOTE: The last data sym Settings	ona Griffin c Ami360 Data : was done on Feb 21, 2024 at 12:30	D am								
Log Out Bridge Monster Search	Users First Name Sarah	Filter user by na Last Name Menchaca	Email smenchaca@bca-	insurance.com 街		Extension 221	Enabled/Dis	sabled	Is Adm User	in Emulate in	Dave
bridge	Brett Joy	Balsley Quisel	bbalsley@bca-insu	urance.com ඬ ance.com ඬ		222 223	Enabled Enabled		User User	Emulate in Emulate in	Dave

Step 3 - Click settings

Image: sport   Image: sport   Image: sport   Image: sport   Image: sport   Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport     Image: sport        Image: sport <th>Redcliffe Tech</th> <th></th> <th></th> <th></th>	Redcliffe Tech			
Available   Communications   Contrast   Sales Automations   Concentrati   To tob   Concentrati   To tob   Activity Monitor   Activity Monitor   Activity Monitor   Activity Monitor   Activity Monitor   Activity Monitor   Concentration   Concentration <td< th=""><th>RT (609) 241-9976</th><th>My Profile Agency Setup</th><th>Agency Account Agency Admin Bridge Downloads</th><th></th></td<>	RT (609) 241-9976	My Profile Agency Setup	Agency Account Agency Admin Bridge Downloads	
<ul> <li>Contractications         <ul> <li>Contractications</li> <li>Contractications</li> <li>Contractications</li> <li>Charge Awatern</li> </ul> </li> <li>Charge Awatern</li> <li>C</li></ul>	Available		My Profile Info	
<ul> <li>Contract Callors</li> <li>Charge Availar</li> <li>Charge Charge Availar</li> <li>Charge Availar</li> <li>Charge Availar</li> <li>Charge Availar</li> <li>Charge Availar</li> <li>Charge Charge Availar</li> <li>Charge Charge Availar</li> <li>Charge Availar</li> <li>Charge Charge Charge</li></ul>	_		First Name	Last Name
I contacts       Tenem       Fee Adatass         I contacts       PPR       Decinancy (Fee Adatass)         I contacts       PPR       Decinancy (Fee Adatass)         I video       Interver       PPR         I contacts       Interver       PPR         I contacts       Interver       Interver         I contactor       Interver       Int	Communications		Redcliffe	Tech
<th>Contacts</th> <th></th> <th>Extension</th> <th>Email Address</th>	Contacts		Extension	Email Address
Image: Selection of the s	Sales Automation	Change Avatar	998	bcainsuran@redcliffe.tech
Image: Control to the state of the sta	🕜 eSign		Alt Phone Number	Time zone
□ Occuments   □ To Do   ○ Activity Monitor   ○ Activity Monitor   ○ Agency Reports     □ Update Information   □ Update Information   □ Change Password   □ Two-Factor Authentication (TFA)   Notifications   □ Out Of Office Text Responder   □ Texting Options   Integration   ● Septort   ● Septort	Video		alt phone number	Eastern
iii To Do   Iii To Do   Iiii Coulder Iiiii   Iiiii Agency Reports     Iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Documents			Idle Timeout (hours)
<ul> <li>Activity Monitor</li> <li>Agency Reports</li> <li>Agency Reports</li> <li>Agency Reports</li> <li>Change Password</li> <li>Change Password</li> <li>Two-Factor Authentication (TFA)</li> <li>Notifications</li> <li>Out of Office Text Responder</li> <li>Texting Options</li> <li>Integration</li> <li>Mobile Settings</li> <li>Log Out</li> </ul>			(609) 241-9976	· · · · · · · · · · · · · · · · · · ·
Agency Reports  Agency Reports  Agency Reports  Update Information  Change Password  Two-Factor Authentication (TFA)  Notifications  Out Of Office Text Responder  Texting Options  Integration  Mobile Settings   Change Password  Texting Options  Integration  Mobile Settings  Change Password  Two-Factor Authentication (TFA)  Notifications  Out Of Office Text Responder  Texting Options  Integration  Mobile Settings  Change Password  Two-Factor Authentication (TFA)  Notifications  Out Of Office Text Responder  Texting Options  Integration  Mobile Settings  Change Password  Change	S Activity Monitor		Outbound Caller ID	E911 Address
	Agency Reports		select caller id	330 TIRON RO, NORTHPIELD, NJ
<ul> <li>Two-Factor Authentication (TFA)</li> <li>Notifications</li> <li>Out Of Office Text Responder</li> <li>Texting Options</li> <li>Integration</li> <li>Mobile Settings</li> <li>Support</li> <li>Settings</li> </ul>			Change Password	
<ul> <li>Notifications</li> <li>Out Of Office Text Responder</li> <li>Texting Options</li> <li>Integration</li> <li>Mobile Settings</li> <li>Log Out</li> </ul>			Two-Factor Authentication (TFA)	
			Notifications	
<ul> <li>Texting Options</li> <li>Integration</li> <li>Mobile Settings</li> <li>Support</li> <li>Settings</li> <li>Log Out</li> </ul>			Out Of Office Text Responder	
<ul> <li>★ Oulde</li> <li>A Support</li> <li>♦ Support</li> <li>♦ Settings</li> <li>♦ Double Settings</li> </ul>			Texting Options	
<ul> <li>★ Guide Mobile Settings</li> <li>♦ Support</li> <li>♦ Settings</li> <li>♦ Log Out</li> </ul>			Integration	
Support     Support     Settings     Could     Settings	🛨 Guide		Mobile Settings	
Boules Dearth and Annual Control of Control	<ul> <li>Support</li> <li>Settings</li> </ul>	-		
	Bridge Manuar Grand			

### Step 4 - Go to Listbuilder

bridge

 $\bigcirc$ 

Redcliffe Tech								
RT (609) 241-9976 •	My Profile Agency Setup	Agency Account	Agency Admin Bridge Downloads					
Dr 998	Choose Setup Action 👻 2 SETS							
V Available -	Ge Agency Text Out Of Office			T Filter Users by Name or Extension				
Communications	Audio							_
Contacts	Bridge Notices		Last Name 🗸	Email 🗸	Extension 🔨	DID	Fax DID	۳
Sales Automation	Chat / Text Macros		Menchaca	smenchaca@bca-insurance.com	221	(609) 236-8206 🕑	(609) 246-3640 🕑	2
🛿 eSign	Email Categories							-
Video	Email Templates		Balsley	bbalsley@bca-insurance.com	222	(609) 236-8235 🕑		8
Documents	Integration Setup		Orieal	iniical@hra.inciranna.rom	223	(600) 256-7335	(267) 793.0214	0
To Do	List Bulloer		dennes	Identified and com	22.0	(007) 200 7000 0	(201)77502140	2
Activity Monitor     Agency Reports	Locations		Cass	mcass@bca-insurance.com	224	(609) 241-9365 🖸		8
	Number Setup     Outbound CallerID Configuration		Durante	mdurante@bca-insurance.com	225	(609) 236-8364 🖸	(609) 264-3494 3	8
	Permissions		Beeby	hbeeby@bca-insurance.com	226	(609) 236-8375 🕝		8
	Text Compliance Tools		Must	emust@bca-insurance.com	227	(609) 308-7145 🕑		2
	<ul> <li>Status</li> <li>Tags Setup</li> </ul>		VanderPyl	nvanderpyl@bca-insurance.com	228	(609) 246-5220 🕑	(609) 264-3534 🕑	8
	Users		Versaggi	kversaggi@bca-insurance.com	229	(609) 248-0783 🕑		8
	B - Lawrence		Cohen	Icohen@bca-Insurance.com	230	(609) 250-0347 🕝		8
🗯 Guide	🛞 🚽 Ingrid		Earle	iearle@bca-insurance.com	231	(609) 250-0745 🕑		8
Support	🕑 🚽 Dawn		Santora	dsantora@bca-insurance.com	232	(609) 256-7800 🕑	(267) 394-7973 🕑	8
C Log Out	圆 🚽 Saratoga		Benefits	kpewor@saratogabenefits.com	233	(609) 250-2269 🕑		8
Bridge Monster Search 🥀	😔 🖵 Mark		Larsen	miarsen@bca-insurance.com	234	(609) 250-2938 🕑		8
	🔍 🗸 Michelle		Zelena	mzelena@bca-insurance.com	235	(609) 256-4565 🖸	(267) 793-0195 🕑	8
- bridge								

#### Step 5 - Build the list

- 1. Field = Integration
- 2. Condition = is equal to
- 3. Value = AMS360
- 4. Click Run Query
- 5. Build List
- 6. Should have contacts matched by the Integration (version 1)



Step 6 - Delete Contacts

- 1. Select All
- 2. Delete Contacts
- 3. Type YES to confirm
- 4. Click Confirm

DT (470) 202-4288 C (470) 202-4288	List Builder		2			Enable Duplicate Checker
🕙 Available 🛛 👻	Revise This List     Rev Assign to New Acct Sales Mgr	Re-Assign to New Acct Service Mgr Add to Campaign Add	Activity Add Tags Call in Power Prospector Delete Contact	ts Export to CSV	Save as Campaign Trigger	Save List
Communications (1)	Contact	Primary Phone	Email Address	Туре	Actions 🚺	🗗 All 🗖 Page
Sales Automation	C Fleming 49 Metrose St #4c Metrose, MA 02176	(617) 662-6208 🕑		Prospect	Call Text Alder To Do	ß
Video	William Howard 19 Lynn Felis Pky Meirose, MA 02176	(617) 662-2433 🗃		Prospect	Call Text Note To Do	ß
	Luann Jammal 16 Hutchisson Rd Arlington, MA 02174	<sup>Home</sup> (617) 643-3724 <sup>(2)</sup>		Prospect	Call Text Note To Do	ß
	M Hawker 075 Massachusetts Arlington, MA 02174	(617) 648-630 Please Confirm		Prospect	Call Text Note To Do	ß
	Mariene Whitney 3 River Road Port Richey, FL 34668	(956) 373-077 Please type YES in the space provided below if you an	ected 1581 contacts? This is permanent. e sure and click Confirm.	Customer	Call Text Note To Do	ß
	Diane Hogan 83 Ponter St Melrose, MA 02176	YES (617) 665-830		Prospect	Call Text Note To Do	ß
	ABC LLC PO Box 987 Brooklyn, NY 11211	-	Cancel Confirm	Customer	Call Text Note To Do	ß
	Sherrie Aldrich 500 Main Street San Diego, CA 92101			Customer	Call Text Note To Do	ß
	Annie Johnson 41 Napies Rd Meirose, MA 02176	(617) 662-1632 C		Prospect	Call Text Note To Do	ß
	Unnamed	Mobile (470) 358-6899 @	Primary 3qa.lead@gmail.com	Prospect	Call Text Note To Do	ß
	Dorothy Heisey 183 Hillside Av Arlington, MA 02174	Home (617) 646-7701 Ø		Prospect	Call Text Note To Do	۲.
Bridge Monster Search 🥀	Kimis Creative Kake Company 100 Cypresesod Drive Houston, TX 77070	Modele (435) 590-8755 G Home (455) 354-6000 G		Customer	Carl Text Node To Do	Ľ
	B Seaver	Unan			·	
U bridge		· <b>1 2 3 4</b>	5 6 7 8 9 10 - 80 /			

Step 7 - Wait for contacts to completely delete

Step 8 - Go to TRG for this agency and change integration to AMS360 v2

Step 9 - Refer to AMS360 Initial Integration setup for Step 2 through Step 9 to setup Access Code/Application

Power Prospecting starts with the right list. Build yours here.

Search your contacts and apply advanced filters to create a focused list that you can email, text, etc. Here's how:

Choose a field (first name, company name, city, tags ...)
 Select the condition for that field (is equal to, contains, does
 S. Enter a value (Joanne, Building Supply Co, Dallas, Prospect...)
 Add more fields and parameters to fine tune your list. For ex
 choose And, C or Not to indicate how that group relates to i

You can remove groups, or reorder them by dragging.

Once you have it the way you like it, click 'Build My List'. You will then see even matches your criteria, and have multiple options for contacting them.

Step 10 - Refer to <u>AMS360 Initial Integration</u> to enter Access Code/Application Key (Agency cody and version numer should be there already, write down if needed)

Step 11 - Turn on Auto Exports

- Step 12 Update Settings
- Step 13 Go back to TRG and refresh the page
- Step 14 Search for Agency

Michael Tuck

### Step 15 - Click Sync AMS360 Data

Conset (470) 207-9120  Conset (470) 207-9120  Available	My Profile A	Agency Setup Agency Account Campaign Registry Account	TRG Admin Agency Admin Q A Bridge Tech Password Q Hardwar	Order Management Bridge Dov	vnloads				
Communications Contacts Sales Automation	TRG Admin - AMS3	60 V2 Demo - Gnarly Agency		Show Hubspot Mapp	Hide Hubspot Map AMS360 V2 Demo	ped 🗌 Disabled Only	Active Only 2.0 Only		
<ul> <li><i>Q</i> eSign</li> <li>Ovideo</li> <li>Documents</li> <li>To Do</li> </ul>	Map to Hubspot	Cancelled	Create Agency	as New Company					
<ul> <li>Activity Monitor</li> <li>Bridge Proposals</li> <li>Agency Reports</li> <li>Secret Feature</li> </ul>	Build Status       Domain UUID: d7d60cca-2ea5-4806-asd6-322d7bc5effe dg         Built       Paid       Provisioned       Welcome Emails Sent       © Complete								
	Select Primary User	Sel	et Primery Contact Number						
	Company Name AMS360 V2 Demo	DAVE Server Dave: blucom8.yourbluewave.com	Bridge Tech User	Gro In Dave Tes	t Build-New	Active Users	Disabled Users		
★ Guide Support	Dave Migration Step 2 Completed: Migration to Dave Completed								
U Log Out Bridge Monster Search	Api Integration AMS360(v2) NOTE: The last data sync wat	nc Ams360 Data s done on Feb 21, 2025 at 11:18 am							
bridge	Settings Users	Filter user by name or extension							

Step 16 -Verify that contacts are starting to sync into the customer's account.

• If contacts do not sync, something is entered wrong, retrace your steps