

AMS360 v2 Migrating Customer

Step 1 - Go to TRG & search for agency

Michael Tucker
Phone: (470) 207-9120
Ext: 3460

My Profile Agency Setup Agency Account **TRG Admin** Agency Admin Order Management Bridge Downloads

Agencies Campaign Registry Bridge Notices Bridge Tech Password Hardware Offerings

TRG Admin Show Hubspot Mapped Hide Hubspot Mapped Disabled Only Active Only 2.0 Only
Choose an Agency to Display?

Choose an agency above.

Step 2 - Emulate as Redcliffe Tech

Michael Tucker
Phone: (470) 207-9120
Ext: 3460

My Profile Agency Setup Agency Account TRG Admin Agency Admin Order Management Bridge Downloads

Agencies Campaign Registry Bridge Notices Bridge Tech Password Hardware Offerings

TRG Admin - BCA Insurance Group - Gnarly Agency Show Hubspot Mapped Hide Hubspot Mapped Disabled Only Active Only 2.0 Only
BCA Insurance Group

Primary Contact Information
Select Primary User Select Primary Contact Number Domain UID: 280ea497-fc6d-3cc2-b5ca-df150e115b3f4

Summary

Company Name	DAVE Server	Bridge Tech User	Group Code	Package	Active Users	Disabled Users	Hubspot ID
BCA Insurance Group	Dave: blucom.yourbluewave.com	bcainsuran@redcliffe.tech Emulate in Devs	Bridge10	Ultimate	30	2	9455512104

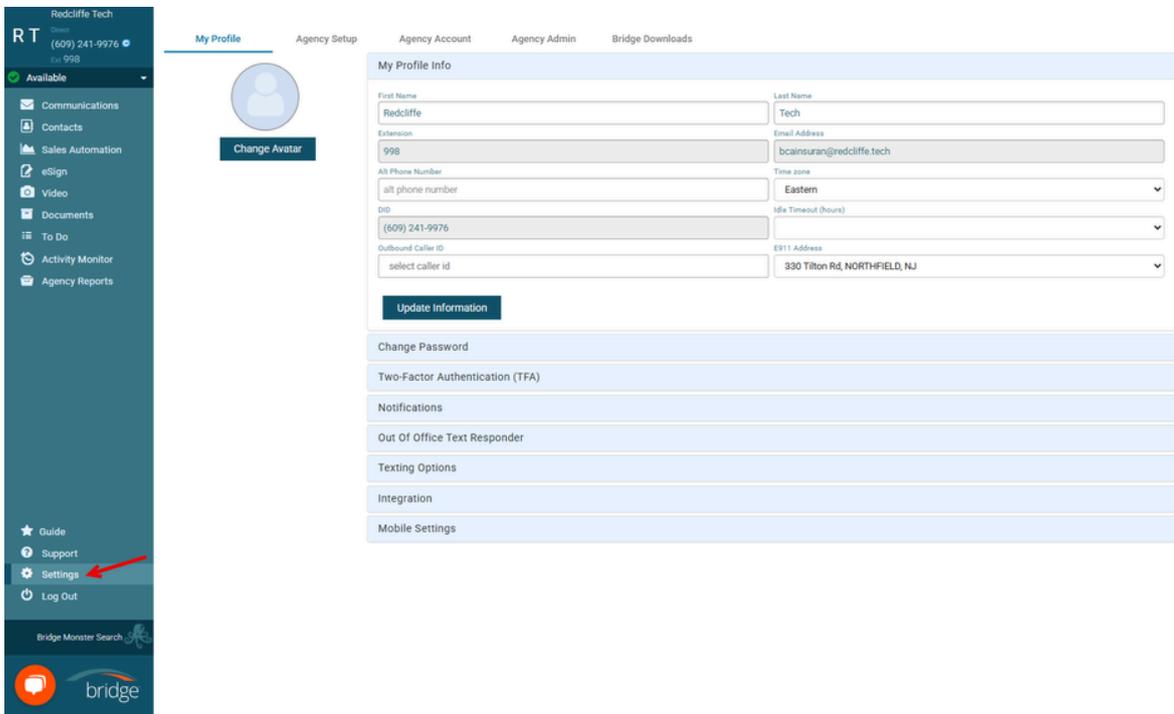
Dave Migration
Step 2 Completed: Migration to Dave Completed
Feb 8, 2023 8:18 am
Processed By: Ramona Griffin

Api Integration
AMS360 [Sync Ams360 Data](#)
NOTE: The last data sync was done on Feb 21, 2024 at 12:30 am

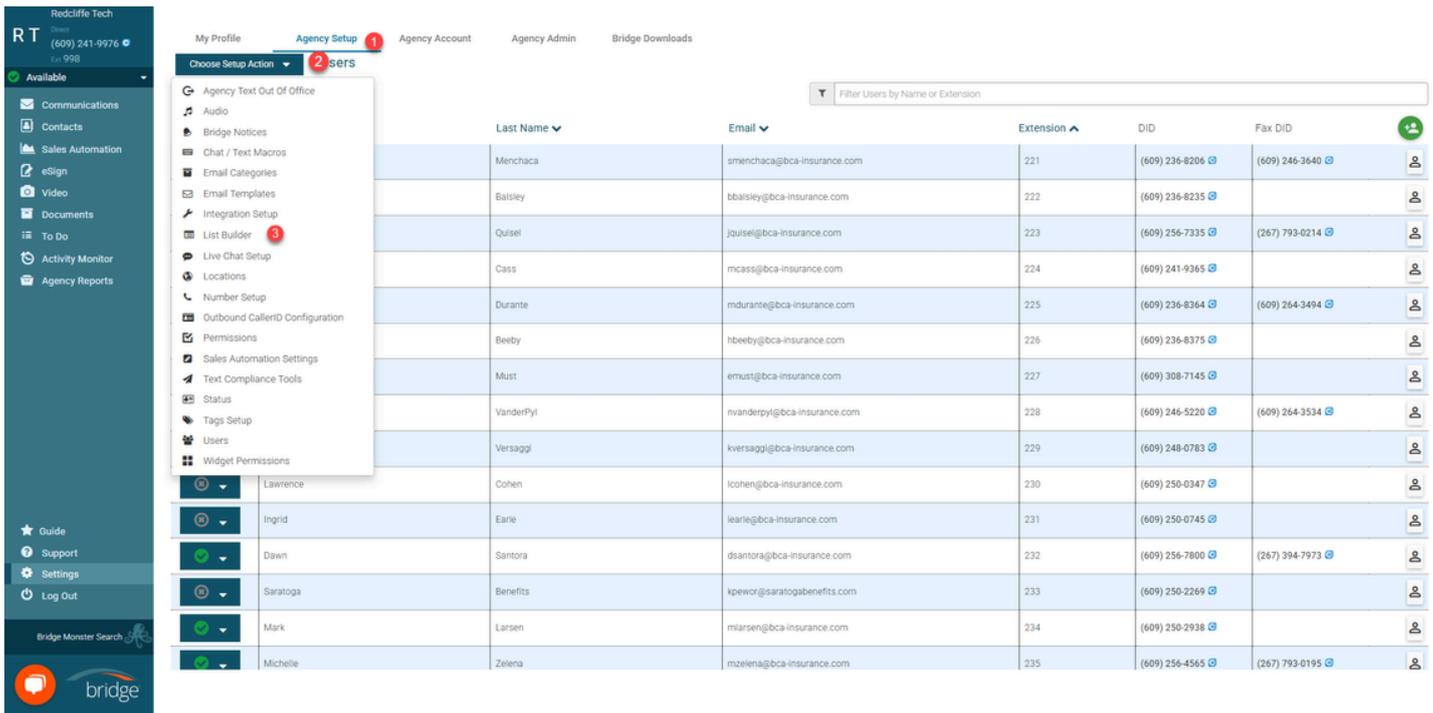
Settings
Users

First Name	Last Name	Email	Extension	Enabled/Disabled	Is Admin	Emulate in Devs
Sarah	Menchaca	smenchaca@bca-insurance.com	221	Enabled	User	Emulate in Devs
Brett	Balsley	bbalsley@bca-insurance.com	222	Enabled	User	Emulate in Devs
Joy	Quisel	jquisel@bca-insurance.com	223	Enabled	User	Emulate in Devs

Step 3 - Click settings

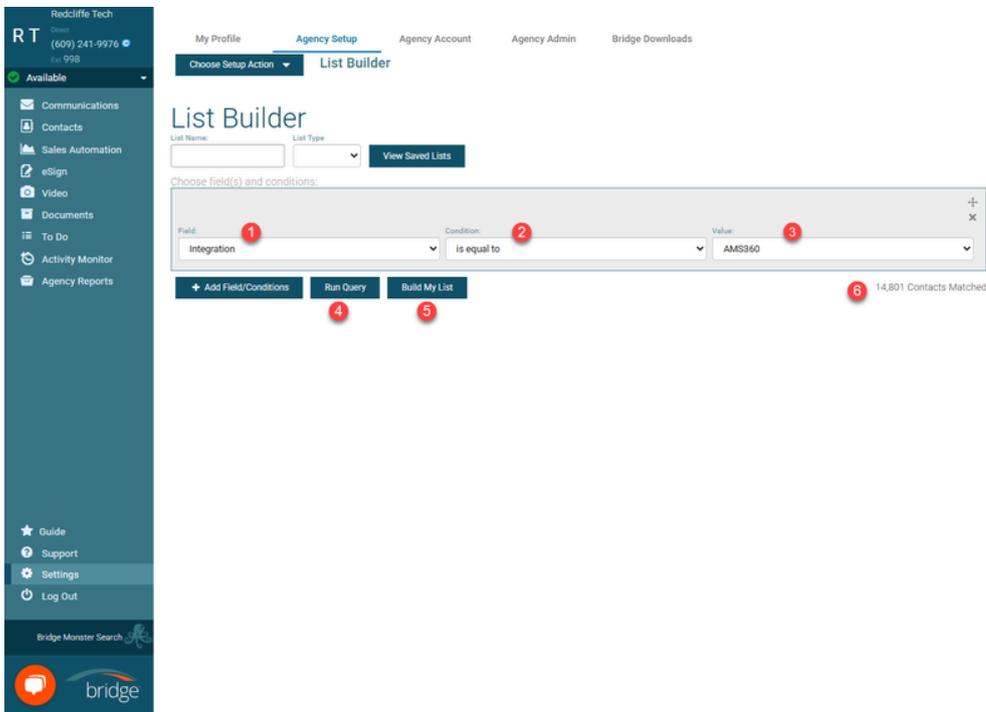


Step 4 - Go to Listbuilder



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)



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 call, email, text, etc. Here's how:

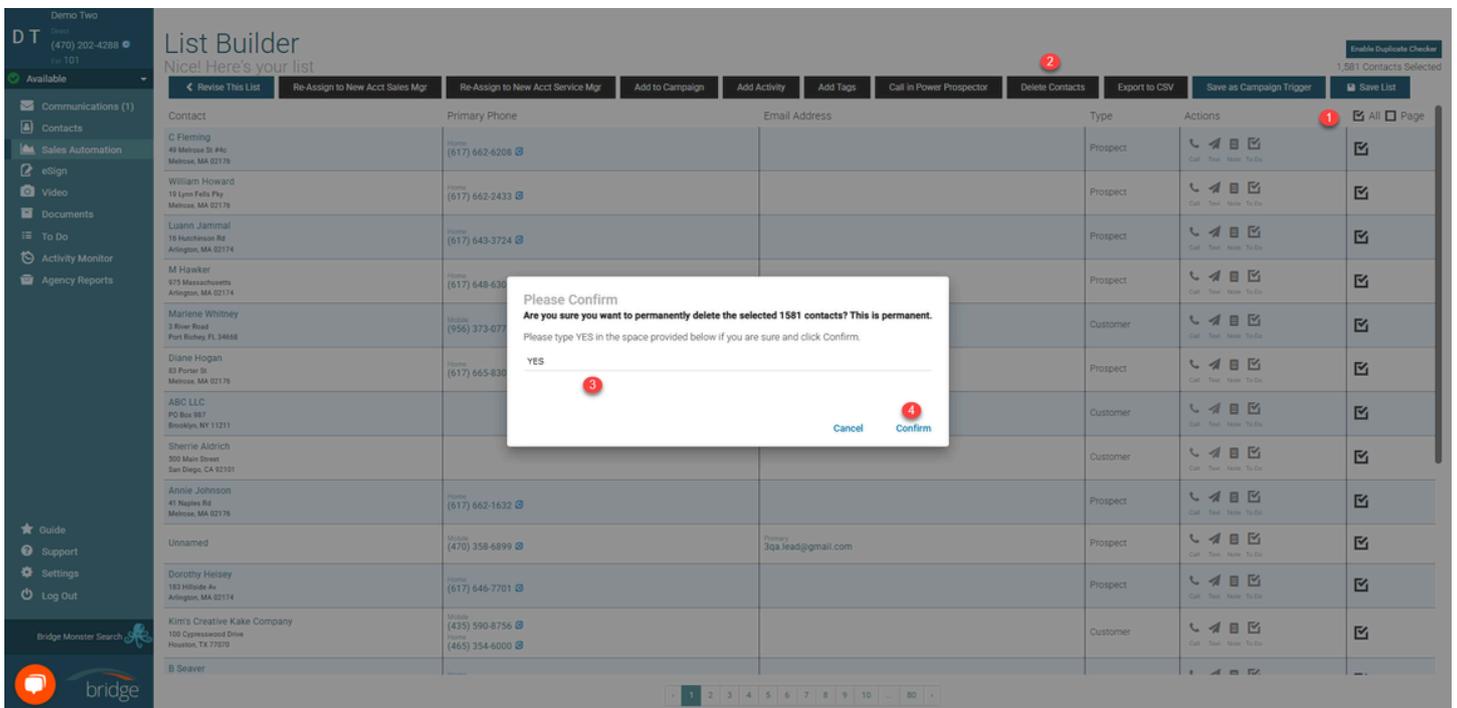
1. Choose a field (first name, company name, city, tags ...)
2. Select the condition for that field (is equal to, contains, does not contain, begins with ...)
3. Enter a value (Joanne, Building Supply Co, Dallas, Prospect ...)
4. Add more fields and parameters to fine tune your list. For each additional field group choose And, Or or Not to indicate how that group relates to the previous group.

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 everyone who matches your criteria, and have multiple options for contacting them.

Step 6 - Delete Contacts

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



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

Step 10 - Refer to [AMS360 Initial Integration](#) to enter Access Code/Application Key (Agency code and version number 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

Step 15 - Click Sync AMS360 Data

The screenshot shows the TRG Admin interface for an agency named 'AMS360 V2 Demo'. The interface includes a sidebar with navigation options like 'Communications', 'Contacts', and 'Settings'. The main content area has tabs for 'My Profile', 'Agency Setup', 'Agency Account', 'TRG Admin', 'Agency Admin', 'Order Management', and 'Bridge Downloads'. Under 'TRG Admin', there are sub-tabs for 'Agencies', 'Campaign Registry', 'Bridge Notices', 'Bridge Tech Password', and 'Hardware Offerings'. The 'Map to Hubspot' section has radio buttons for 'All', 'Customer', and 'Cancelled', with 'All' selected. Below this is a 'Build Status' section with radio buttons for 'Built', 'Paid', 'Provisioned', 'Welcome Emails Sent', and 'Complete', with 'Complete' selected. The 'Primary Contact Information' section has fields for 'Select Primary User' and 'Select Primary Contact Number'. A 'Summary' table is displayed with columns for Company Name, DAVE Server, Bridge Tech User, Group Code, Package, Active Users, and Disabled Users. The 'Api Integration' section has a button labeled 'AMS360(v2) Sync Ams360 Data' and a note: 'NOTE: The last data sync was done on Feb 21, 2025 at 11:18 am'. The 'Settings' section has a dropdown menu for 'Users' with the option '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