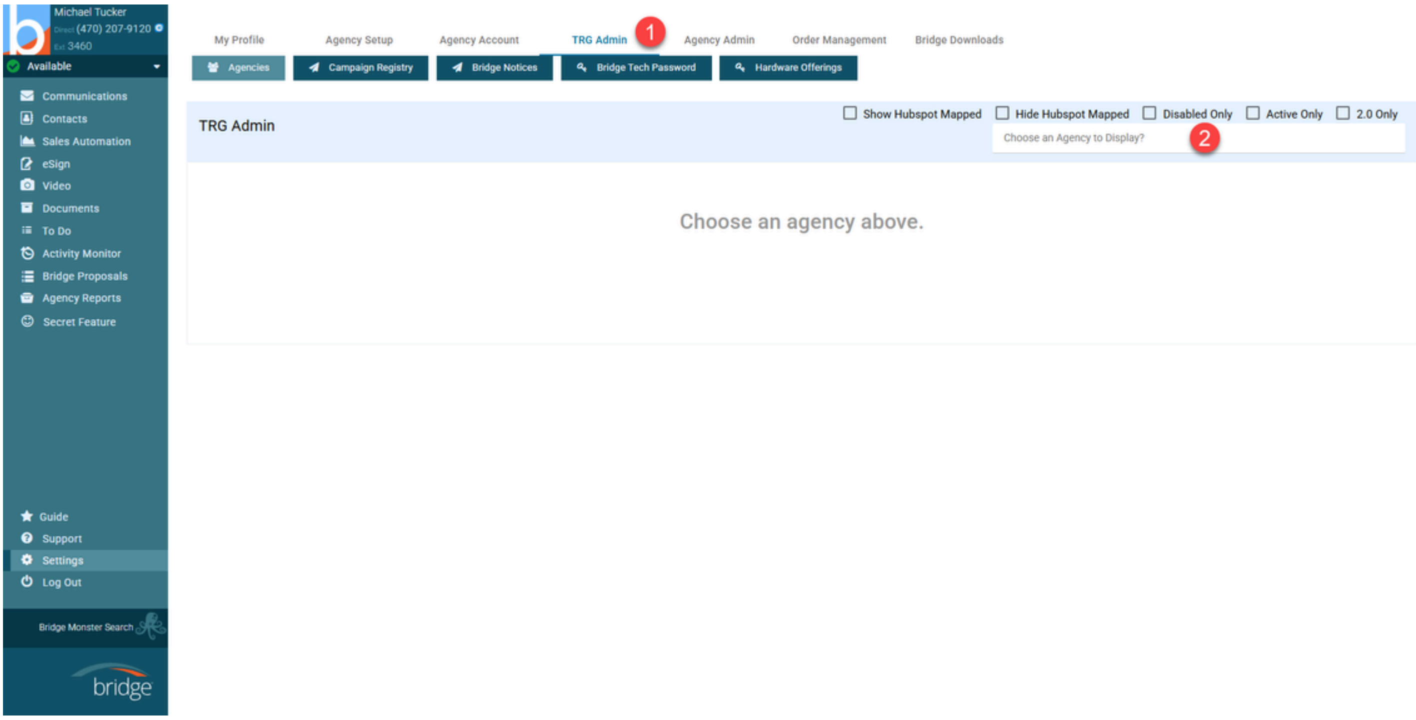
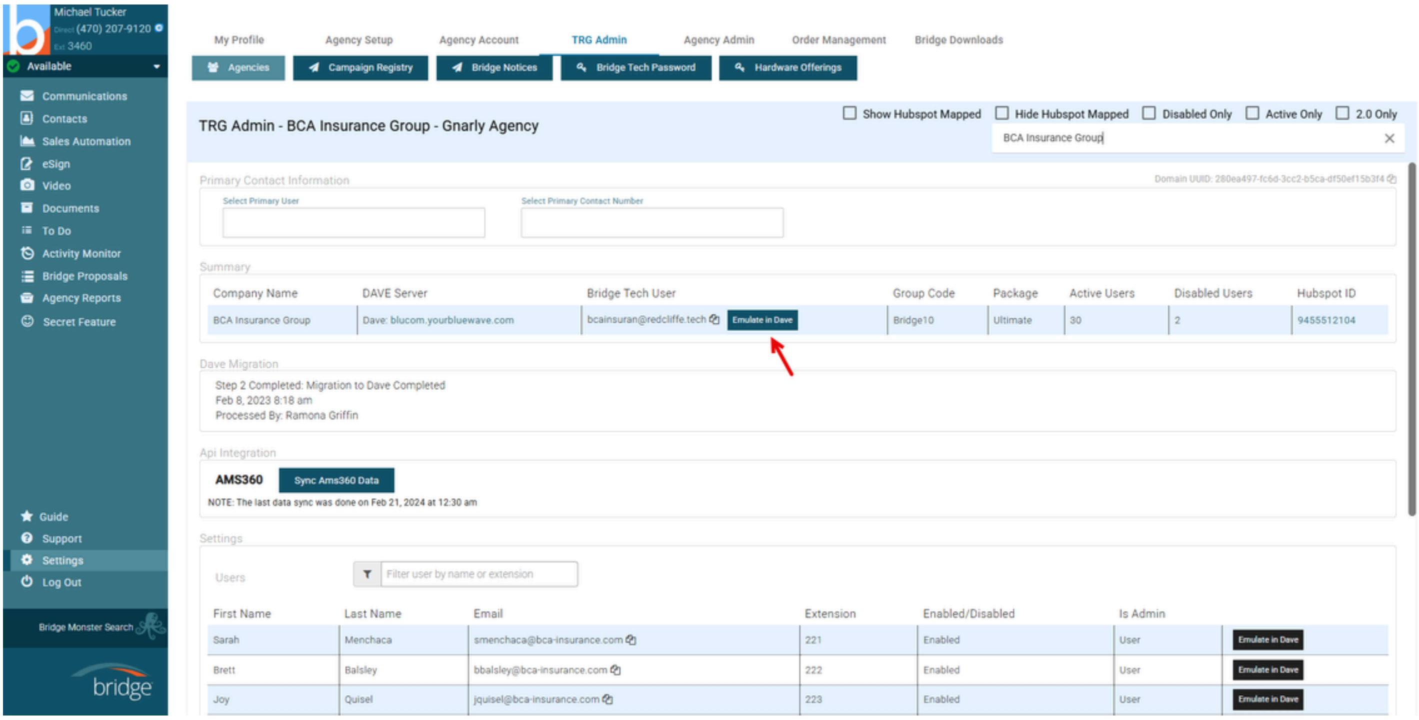
AMS360 v2 Migrating Customer

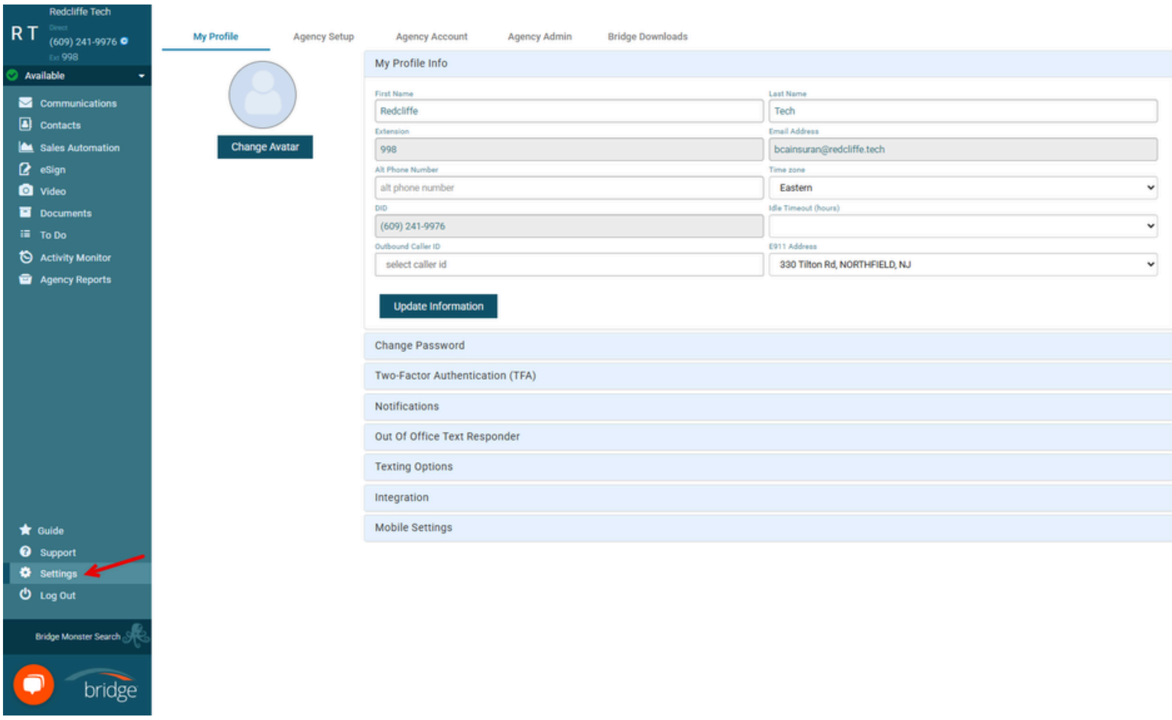
Step 1 - Go to TRG & search for agency



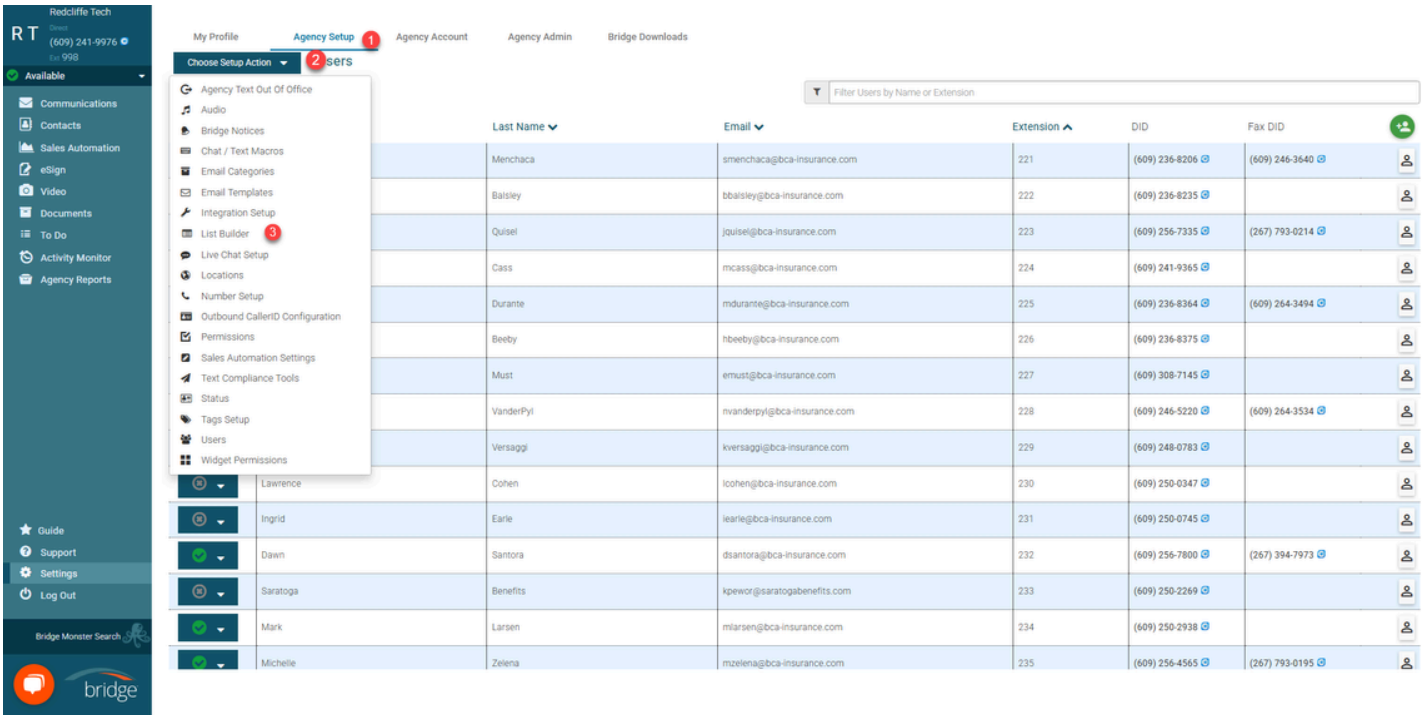
Step 2 - Emulate as Redcliffe Tech



Step 3 - Click settings

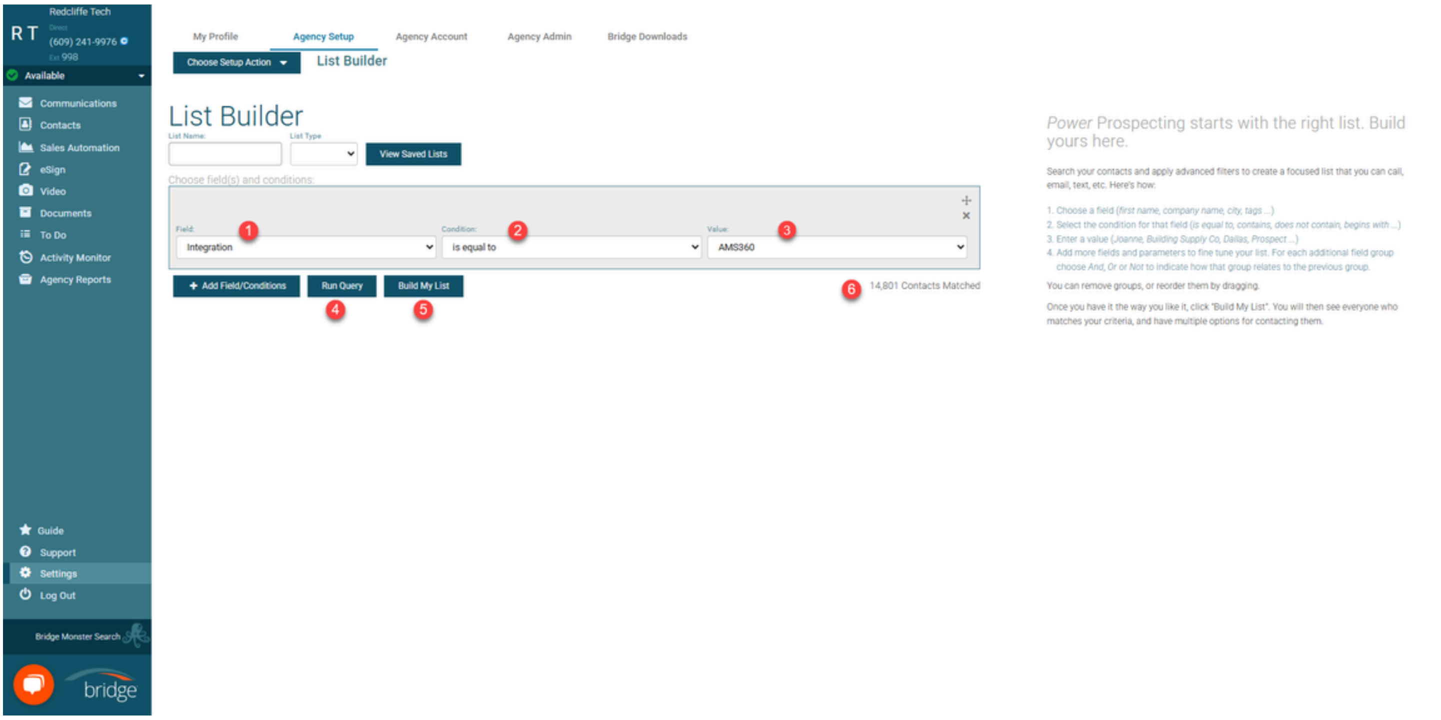


Step 4 - Go to Listbuilder



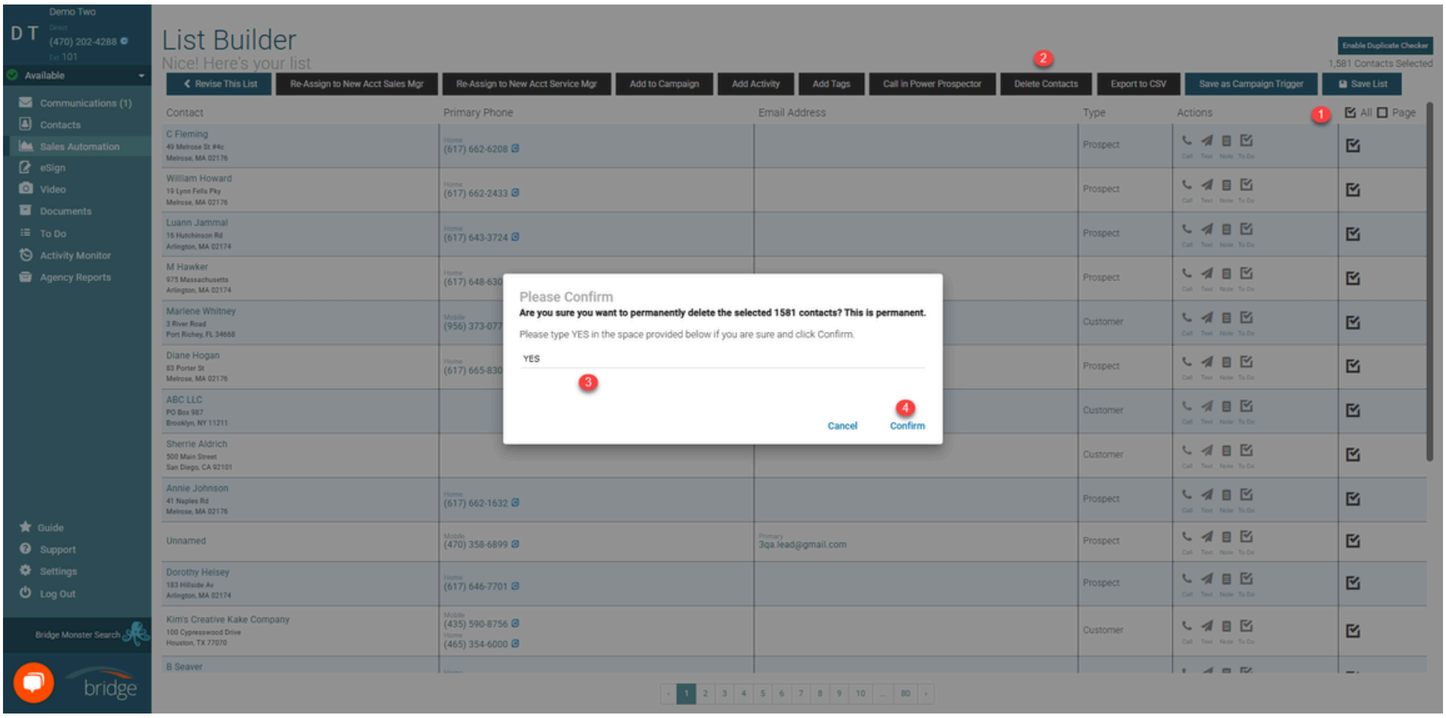
Step 5 - Build the list

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)



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 cody and version numer should be there already, write down if needed)

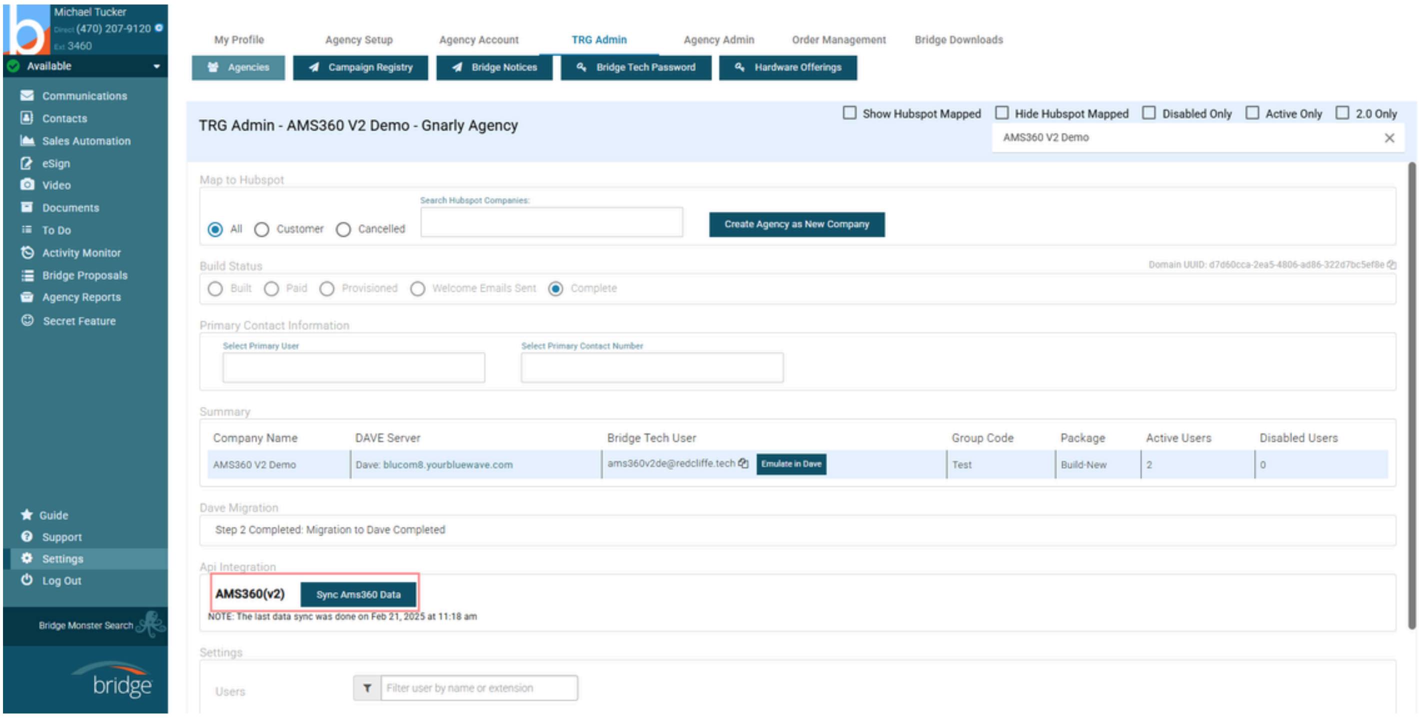
Step 11 - Turn on Auto Exports

Step 12 - Update Settings

Step 13 - Go back to TRG and refresh the page

Step 14 - Search for Agency

Step 15 - Click Sync AMS360 Data



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