



Vertafore/AMS360 Training Guide

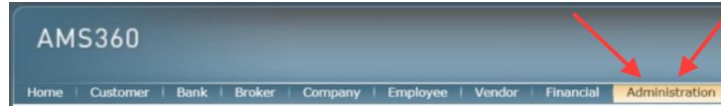
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Step 1

Log in to AMS360

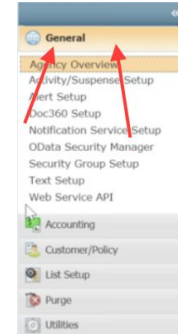
Step 2

Once you are logged in to AMS360, go to "Administration"



Step 3

Click "General" on the left hand side



Step 4

Click "Web Service API"



Step 5

Create a login for DYL with following options
(this is a username, not an email address)



Step 6

Ensure that password is simple
(one uppercase, one lowercase,
and one number. For reference:
<https://help.vertafore.com/ams360/content/contextensitive/download-integration/cswebserviceapisetup...>

Step 7

Enable all Privileges for the new DYL account aside from ones listed below (the privileges are the checkboxes under "Entity Access" when the Web Service Application Authorization screen comes up):

- Under the "Retrieve" column, leave the following fields unchecked: Bank, PolicyTransactionPremium, Remark, Suspense, Vendor, VendorInvoice
- Under the "Insert" column, leave the following fields unchecked: DirectBillEntry, Policy, PolicyContact, PolicyTransactionPremium, Remark, Suspense
- Under the "Update" column, leave the following fields unchecked: CustomerProfileAnswer, DirectBillEntryPosting, Policy, PolicyContact, PolicyTransactionPremium, Remark, Suspense
- Under the "Delete" column, leave **ALL** fields unchecked

Entity Access				
Check the options you would like the web service user to have access to. Note: Some options are not available to an entity and therefore cannot be checked.				
<input type="button" value="Check All"/> <input type="button" value="Uncheck All"/>				
Entity	Retrieve	Insert	Update	Delete
Activity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CustomerContact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CustomerProfileAnswer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DirectBillEntry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Entity Access				
Check the options you would like the web service user to have access to. Note: Some options are not available to an entity and therefore cannot be checked.				
<input type="button" value="Check All"/> <input type="button" value="Uncheck All"/>				
Entity	Retrieve	Insert	Update	Delete
PlanType	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PolicyContact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PolicyTransactionPremium	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remark	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suspense	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VendorInvoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 8

In Activity/Suspense Setup, make the following Activities in your AMS System(case sensitive):
DYL Call Recordings, DYL Voicemail, DYL Inbound Calls
<---All spelled exactly like that, same capitalization and everything (for reference: https://help.vertafore.com/ams360/content/contextsensitive/system_admin/cssetupaction.htm)

Step 11

Enter in the Organization ID (include -1 at the end)

Step 9

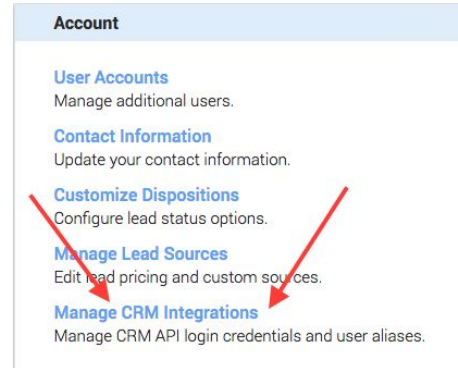
Go back to [DYL.com](#)

Step 12

Add the AMS360 URL (include all the way up to V+numbers, nothing after the numbers)

Step 10

After logging in, go to Settings>Manage CRM Integrations



Step 13

Add the AMS360 DYL login and password you just created in AMS360

Step 14

Status should read as "Verified" now. If not, refresh/reload the page. If status is still reading as "Unverified," please give us a call at: [888-310-4474](tel:888-310-4474)

Details	
Organization ID	3034765-1
Launch URL	https://www.ams360.com/v1611382
Login	DYL
Password	*****
Status	Verified

Step 15

If status reads "Verified," go to Assign Employees in the upper left. From the dropdown menus, choose the appropriate Exec and Employee, and match them with the DYL user.



Step 16

You will notice the option to set up DYL Users. On this screen you will be matching up Admin/Exec from AMS360 with a DYL User. Below is an example.

Settings / Vertafore / Employees

Match a Vertafore user to a DYL user.

Assigned		
DYL User	Exec	Rep
Sara [redacted]	Sara [redacted]	Account House
Jessica [redacted]	Jessica [redacted]	Account House
Tamara [redacted]	Tamara [redacted]	Account House
Jae [redacted]	Jae [redacted]	Account House
Markita [redacted]	Markita [redacted]	Account House
Tara [redacted]	Tara [redacted]	Account House
John [redacted]	John [redacted]	Account House
Logan [redacted]	Christopher [redacted]	Account House
Eric [redacted]	Eric [redacted]	Account House
Bill [redacted]	Bill [redacted]	Account House
Angie [redacted]	Angela [redacted]	Angela Cooper
Gary [redacted]	Gary [redacted]	Account House
Emprise [redacted]	Emprise [redacted]	Account House
Chris [redacted]	Chris [redacted]	Account House

Step 17

Once you successfully match up DYL Users with AMS360 Exec/Rep, you will need to go back to the original Manage CRM Integrations page by clicking “Vertafore” at the top of the page.

Step 18

On this page, you will now set up and choose which pieces of information that you’d like DYL to transfer over to AMS360. Select which options you want, and click “Update”

Integration Options		Update
Notes	<input checked="" type="checkbox"/>	
Sale	<input type="checkbox"/>	
Voicemails	<input checked="" type="checkbox"/>	
Inbound	<input checked="" type="checkbox"/>	
Call Popup	<input checked="" type="checkbox"/>	
Prospect	<input checked="" type="checkbox"/>	
Call Recordings	<input checked="" type="checkbox"/>	

Step 19

Below the “Integration Options” box, you’ll notice the Call Producer Popup box. If you have Call Popup option selected, the screenshot below details how to set it up for users. You’ll select a DYL User from the dropdown menu, and click “Add”

Toggle Producer Call Popup		Add	Edit
Enabled			
Brittany [REDACTED]			
Angie [REDACTED]			
Jon [REDACTED]			
Lynn [REDACTED]			
Mike [REDACTED]			
Shawnda [REDACTED]			
Jorge [REDACTED]			
Jennifer [REDACTED]			
Frannie [REDACTED]			
Creasiaha [REDACTED]			
Lee [REDACTED]			
Leslie [REDACTED]			
Katrina [REDACTED]			
Damarious [REDACTED]			
Name	Katelyn [REDACTED]		

Step 20

That’s it! This is the final step for setting up your account properly for the DYL/AMS360 Integration. Be sure to allow 5-10 minutes for the API to communicate with our servers, as it takes some time for the two platforms to communicate properly. Should you have any questions, please feel free to call DYL at 888-310-4474.