SalesTrack™ – AMS360® Integration Mapping

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Account Fields Mapping

When the Opportunity step **Complete Submission Requirements**, is marked **Completed**, SalesTrack, the customer is then created in AMS360. Changes to the customer in SalesTrack will be updated in AMS360 if the records are already synched. An account is created in SalesTrack when a Customer is created in AMS360 if the Account doesn't already exist in SalesTrack. All account updates in AMS360 sync back to SalesTrack when the Account and Customer are already linked. For information on the Accounts workflow click here.

SalesTrack UI Field	AMS360 UI Field	Sync Frequency	Notes
Type of Business			
Personal	Personal	Nightly	New Lines of Business and any changes, such as inactivating an LOB will sync nightly.
Commercial	Commercial	Nightly	New Lines of Business and any changes, such as inactivating an LOB will sync nightly.
Client Type	Customer Type	Real-Time	
Account Name	Firm Name	Real-Time	
First Name	First	Real-Time	
Last Name	Last	Real-Time	
Middle Name	Middle	Real-Time	
Street Address 1	Address Line1	Real-Time	
Street Address 2	Address Line2	Real-Time	
City	City	Real-Time	
County	County	Real-Time	Mapped to Address 1: County in SalesTrack
State/Province	State	Real-Time	
Zip code	Zip Code	Real-Time	
Phone	Business Phone	Real-Time	
Company Email Address	EMail	Real-Time	
Agency Primary Executive	Account Exec Code	Real-Time	
Agency Primary Representative	Account Rep Code	Real-Time	
Division that that owns record	GL Division Code	Real-Time	Changes to structure of the division/branch/department will sync nightly.
Branch that that owns record	GL Branch Code	Real-Time	Changes to structure of the division/branch/departments will sync nightly.
Department that that owns record	GL Department Code	Real-Time	Changes to structure of the division/branch/departments will sync nightly.

Sales Track UI Field	AMS360 UI Field	Sync Frequency	Notes
Group that that owns record	GLGroup Code	Real-Time	Changes to structure of the division/branch/departments will sync nightly.
Customer ID	Customer Id	Real-Time	
Customer #	Customer Number	Real-Time	
URL Website	Customer Web Address	Real-Time	
Business entity type	Business Entity	Real-Time	
Owner		Real-Time	SalesTrack owner is based on the Account Exec set in AMS360, if no match found, owner is set to the Agency Admin (who is the integration user)

Contacts Mapping

When the Opportunity step **Complete Submission Requirements**, is marked **Completed** in SalesTrack, the contact from the opportunity is created in AMS360. Any changes to the contact or customer in SalesTrack will be updated in AMS360 if the record is already synched. For information on the Contacts workflow click here.

SalesTrack UI Field	AMS360 UI Field	Sync Frequency	Notes
Full Name	Contact Name	Real-Time	
Email	Email	Real-Time	
Business Phone	Business Phone	Real-Time	
Mobile Phone	Cell Phone	Real-Time	
Home Phone	Residence Phone	Real-Time	
Mailing Address 1	Address1	Real-Time	
Mailing Address 2	Address2	Real-Time	
Mailing City	City	Real-Time	
Mailing State or Province	State	Real-Time	
Mailing Zip code	Zip Code	Real-Time	
FAX	Fax Phone	Real-Time	
Parent Account Id	Customer Id	Real-Time	

Opportunity Mapping

When the Opportunity step **Complete Submission Requirements**, is marked **Completed**, SalesTrack will create a Submission for Commercial Lines, and a Policy Quote for Personal Lines. A CSR will need to complete all of the policy information in AMS360. The added information will be visible in SalesTrack in the AMS360 Details section. For information on the Opportunity workflow click here.

SalesTrack UI Field	AMS360 UI Field	Sync Freqency	Notes
Opportunity Type	Policy Type	Real-Time	
Type of Business	Type of Business	Real-Time	
Lines of Business	Line of Business Codes	Real-Time	Mapped to Agency list.
	Line of Business IDs	Real-Time	
Division	GL Division Code	Real-Time	
Branch	GL Branch Code	Real-Time	
Department	GL Department Code	Real-Time	
Group	GL Group Code	Real-Time	
Primary Executive	Exec Code	Real-Time	
Primary Rep	Rep Code	Real-Time	
AMS360 Submission ID	Submission Id	Real-Time	

Activities Mapping

SalesTrack syncs completed activities to AMS360. This includes completed task, appointment, phone call, email when sent or when an email is tracked through the Outlook for CRM app. Activities will only sync if their parent record has already been synced with AMS360. Parent records are accounts, contacts, lead or opportunity. Any activity that is closed/completed prior to a parent record sync will remain in SalesTrack until the parent record is synced/created in AMS360. For information on Activities click here.

SalesTrack UI Field	AMS360 UI Field	Sync Freqency	Notes
Customer Id	Customer Id	Real-Time	All activities associated with a Contact in SalesTrack syncs to the Customer in AMS360.
Activity Date	Activity Date	Real-Time	
Activity Time	Activity Time	Real-Time	
Employee Code	Employee Code	Real-Time	
Policy Id	Policy Id	Real-Time	
Description	Description	Real-Time	
Attachments	Documents	Real-Time	

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Policy Mapping

Commercial Lines polices created in SalesTrack will flow to AMS360 as a Submission, while Personal Lines Policies will flow as Quotes. Policies and Submissions created in AMS360 will be visible in the AMS360 Details section on the Account in SalesTrack.

SalesTrack UI Field	AMS360 UI Field	Sync Frequency	Notes
Policy Id	Policy Id	Real-Time	Ability to view AMS360 Details section is real-time
Policy Name	Customer Name + Line of Business (From Line of Business section)	Real-Time	
Named Insured	First Name Insured	Real-Time	
Policy Number	Policy Number	Real-Time	
Annual Premium	Full-Term Premium	Real-Time	
Policy description	Description	Real-Time	
Policy Status	Status	Real-Time	
Division	GL Division Code	Real-Time	
Branch	GL Branch Code	Real-Time	
Department	GL Department Code	Real-Time	
Group	GL Group Code	Real-Time	
Insurance Company	Writing Company Code	Real-Time	
Primary Executive	Exec Code	Real-Time	
Primary Rep	Rep Code	Real-Time	
Effective Date	Effective Date	Real-Time	
Expiration Date	Expiry Date	Real-Time	
Billing Method	Bill Method	Real-Time	
Opportunity Type (Within Opportunity)	Policy Type	Real-Time	This is mapped to the Opportunity's Opportunity Type field
Company Type	Company Type	Real-Time	
Type of Business	Type of Business	Real-Time	
Customer	Customer Id	Real-Time	
Lines of Business	Line of Business Codes	Real-Time	
	Line of Business IDs	Real-Time	
Policy Sub Type	Policy Sub Type	Real-Time	
Billing Method	Bill Method	Real-Time	

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