

AMI USER GUIDE:

1. Welcome to AMI. This guide will help you get started with setting up your lists, contacts, intro/outro messages and how to send both a voice and text message.

First off - Go to www.qtami.com – click member login on the top menu bar – and enter in your login id and password.

2. To get started Click on the Lists tab on the top menu bar. Then Click 'add new list'.



- 3.

The screenshot shows the 'Add List' form. At the top is a navigation bar with tabs for 'Contacts', 'Lists', 'Sounds', 'Text messages', and 'Call History'. The 'Lists' tab is selected. Below the navigation bar is the 'Add List' section. It contains three input fields: 'Description: (*)', 'Direct Connect Number:', and 'Caller ID:'. Each field is circled in red. Below the fields is a 'Save List' button. At the bottom of the form are two sections of text: 'Direct connect number (default: none)' and 'Caller ID (default: 866-665-4386)'. The text for 'Direct connect number' explains that it is the default number customers will be connected to during the call. The text for 'Caller ID' explains that changing it will override the default system caller ID and that back the number to replay the recording.

Description – (Here is where you want to enter in your list description – for example, Spencer’s Clients, Emergency List, Bobs Market Commentary)

Direct Connect Number - (this is the number your contacts will be connected to by pressing ‘0’ while listening to your message)

Caller ID should be filled out ONLY if you want a different number to appear on their phone.
*** Note entering in a caller ID here will disable the ability for recipients to – on a missed call – call the number back and have your message play back to them. Most users elect to leave caller ID blank for that reason.

- Once you have Completed the Fields – Click Save List

Contacts Lists Sounds Text messages Call History

Code 120540: "Spencer Client List" created

Lists

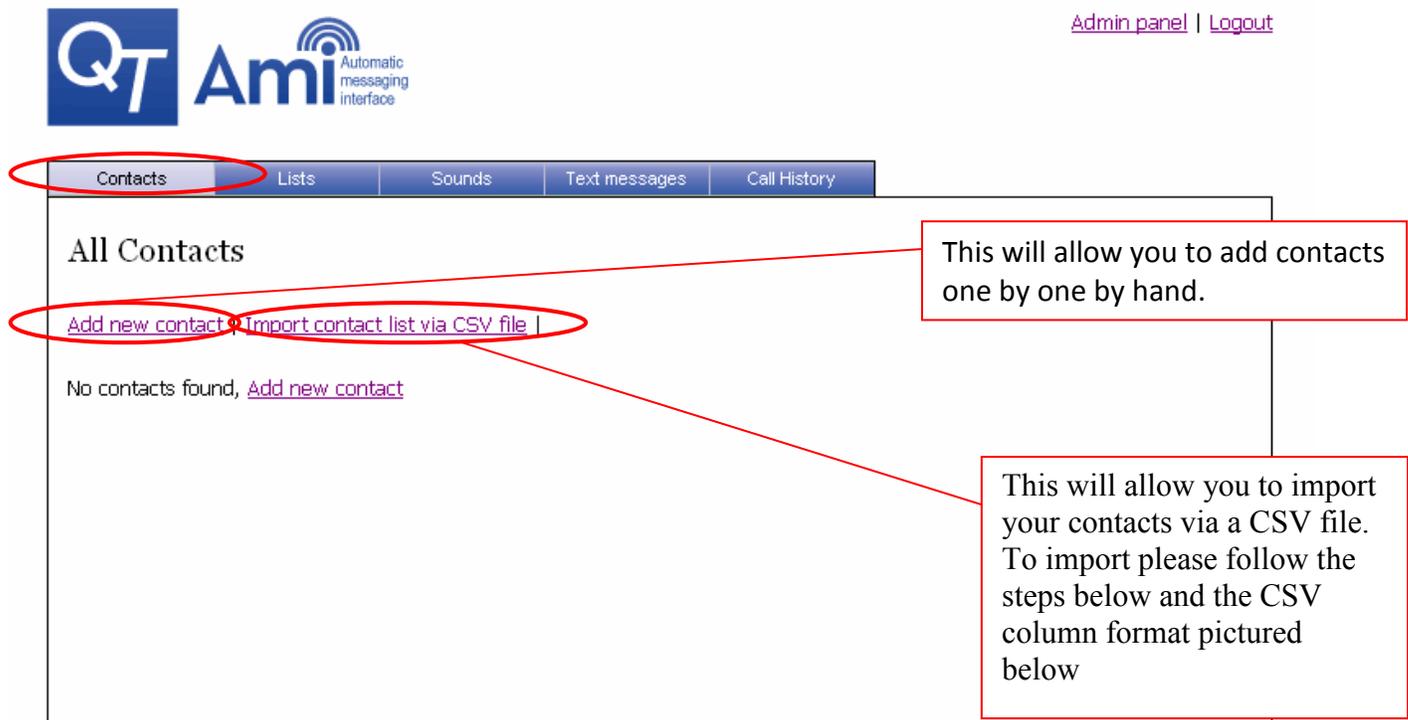
Menu: [Add new list](#)

Description	List ID	View	Intro	Outro	Action
Spencer Client List	120540	Contact list	System default	None	  

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Great Job! Now your list has been created. It should look similar to the picture above. The list view, will allow you to view all of your lists in the above format. The List ID # is the number you will enter when calling AMI, AMI will ask you to please enter in your list ID.

- Now we are going to add your contacts to that List you just created. To do that click on "CONTACTS" on the top menu bar. After clicking Contacts you will see this screen below.



Admin panel | Logout

Contacts Lists Sounds Text messages Call History

All Contacts

[Add new contact](#) | [Import contact list via CSV file](#) |

No contacts found, [Add new contact](#)

This will allow you to add contacts one by one by hand.

This will allow you to import your contacts via a CSV file. To import please follow the steps below and the CSV column format pictured below

There are two ways to add a contact. The first is by clicking "Add New Contact" – This will allow you to add contacts one by one by hand. Below is a picture of what your screen will look like when you click 'add new

contact'. Once you have filled out all the fields for the contact, you can simply check the "member" box for which particular list you want the contact to be added to.

***Note: custom transfer number should be filled out **only** if this particular contact needs to be transferred to a different number than the DIRECT CONNECT number associated with your list. Again recipients can direct connect back to any number you wish by pressing '0' at any time.



[Admin panel](#) | [Logout](#)

Contacts Lists Sounds Text messages Call History

Edit Contact

Name: (*)

Phone Number: (*)

Company:

Email Address:

Billing Code:

Assign contact to lists

List name	Member	Custom transfer number
Spencer Client List (120540)	<input checked="" type="checkbox"/>	<input type="text"/>

Check this box to make this contact a member of this particular list

Custom Transfer Number will allow you to change the Direct Connect number for this contact only. So if this particular client is special, when he presses '0' during my message I want him to connect straight to my cell phone instead of the office phone like everyone else on the list.



[Admin panel](#) | [Logout](#)

Contacts Lists Sounds Text messages Call History

All Contacts

[Add new contact](#) | [Import contact list via CSV file](#) | [Export contacts as CSV](#)

Select	Name	Phone number	Action
<input type="checkbox"/>	Bob Jones	312-896-2071	

[Toggle Checkboxes:](#) Add selected contacts to List ID:

Now That you have added your first contact by hand, I recommend you Export this contact to CSV file. That way you see the format of the CSV and you can enter all of your contacts into the CSV file and re-import all of your contacts in at once. To export this contact simply click Export Contacts as CSV

Contacts Lists Sounds Text messages Call History

All Contacts

[Add new contact](#) | [Import contact list via CSV file](#) | [Export contacts as CSV](#)

Select

Toggle Checkboxes: Delete

Opening 2010-04-06-flami-contacts.csv
Export contacts in comma-separated value format

You have chosen to open

2010-04-06-flami-contacts.csv
which is a: Microsoft Office Excel Comma-Separated Values File
from: http://ami.futuresline.com

What should Firefox do with this file?

Open with: Microsoft Office Excel (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

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Upon clicking export this screen will pop up. Select Open with and OK.

	A	B	C	D	E	F	G
1	name	phone	email	company	billing_code		
2	Bob Jones	3.13E+09			Dave Smith		
3							
4							
5							
6							

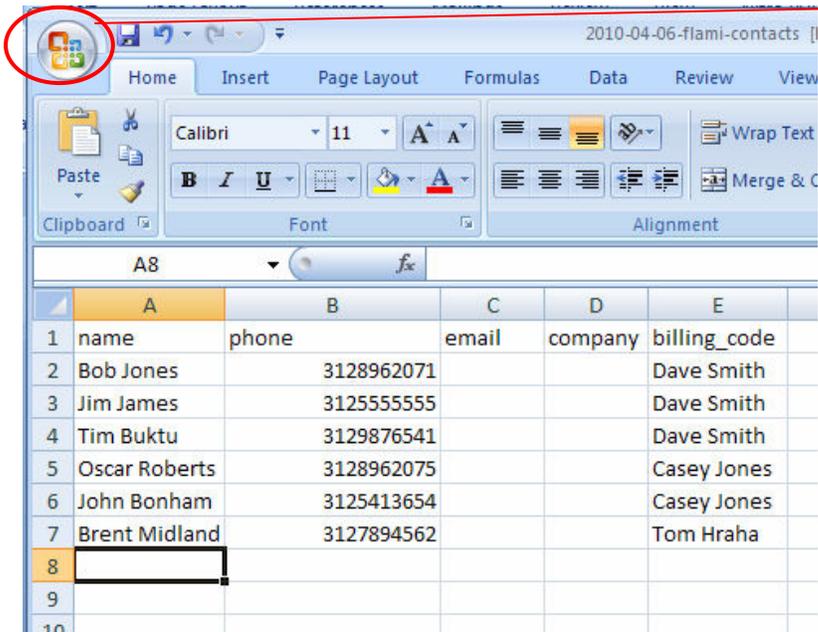
Don't be alarmed by the way the number initially shows up! Just expand the column and it will appear as it should.

	A	B	C	D	E	F
1	name	phone	email	company	billing_code	
2	Bob Jones	3128962071			Dave Smith	
3						
4						
5						
6						

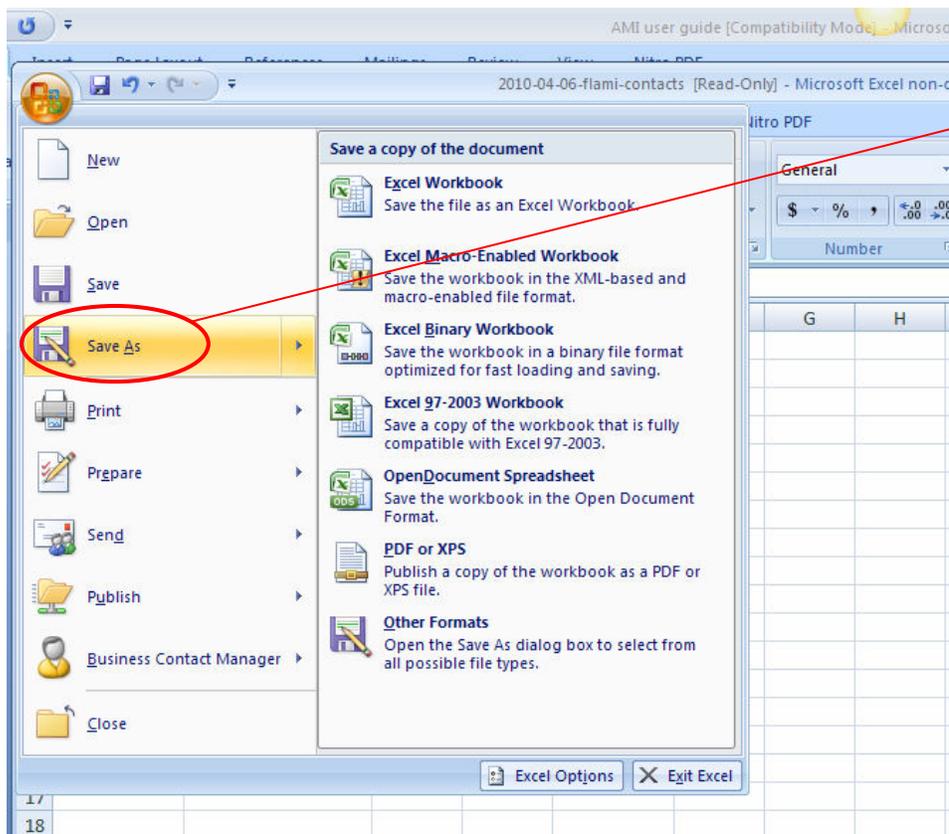
Enter in your contacts, like so

	A	B	C	D	E	F
1	name	phone	email	company	billing_code	
2	Bob Jones	3128962071			Dave Smith	
3	Jim James	3125555555			Dave Smith	
4	Tim Buktu	3129876541			Dave Smith	
5	Oscar Roberts	3128962075			Casey Jones	
6	John Bonham	3125413654			Casey Jones	
7	Brent Midland	3127894562			Tom Hraha	
8						

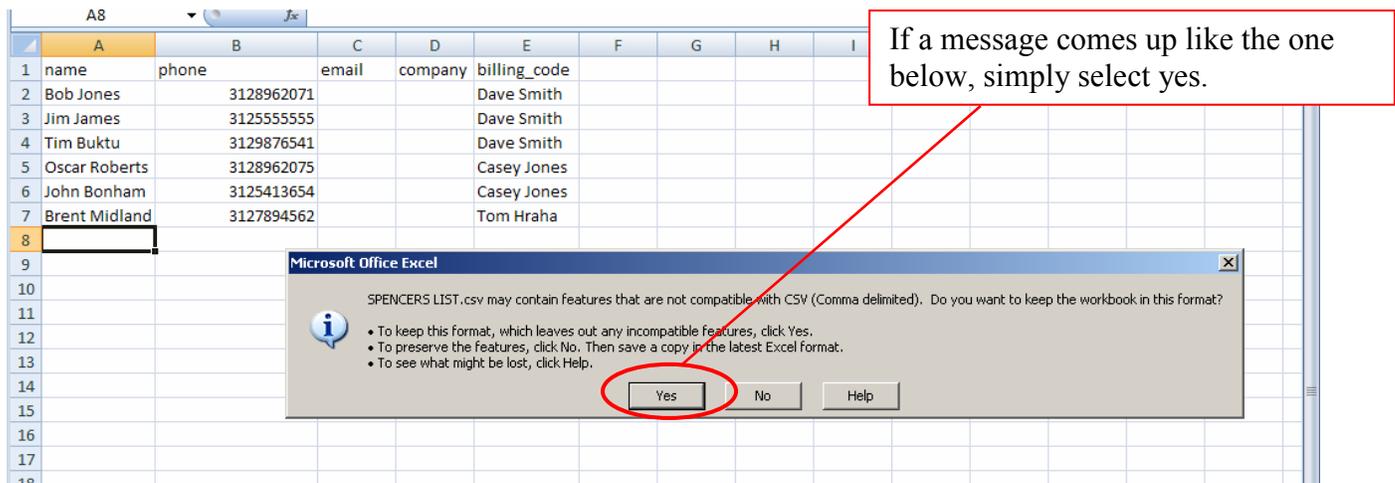
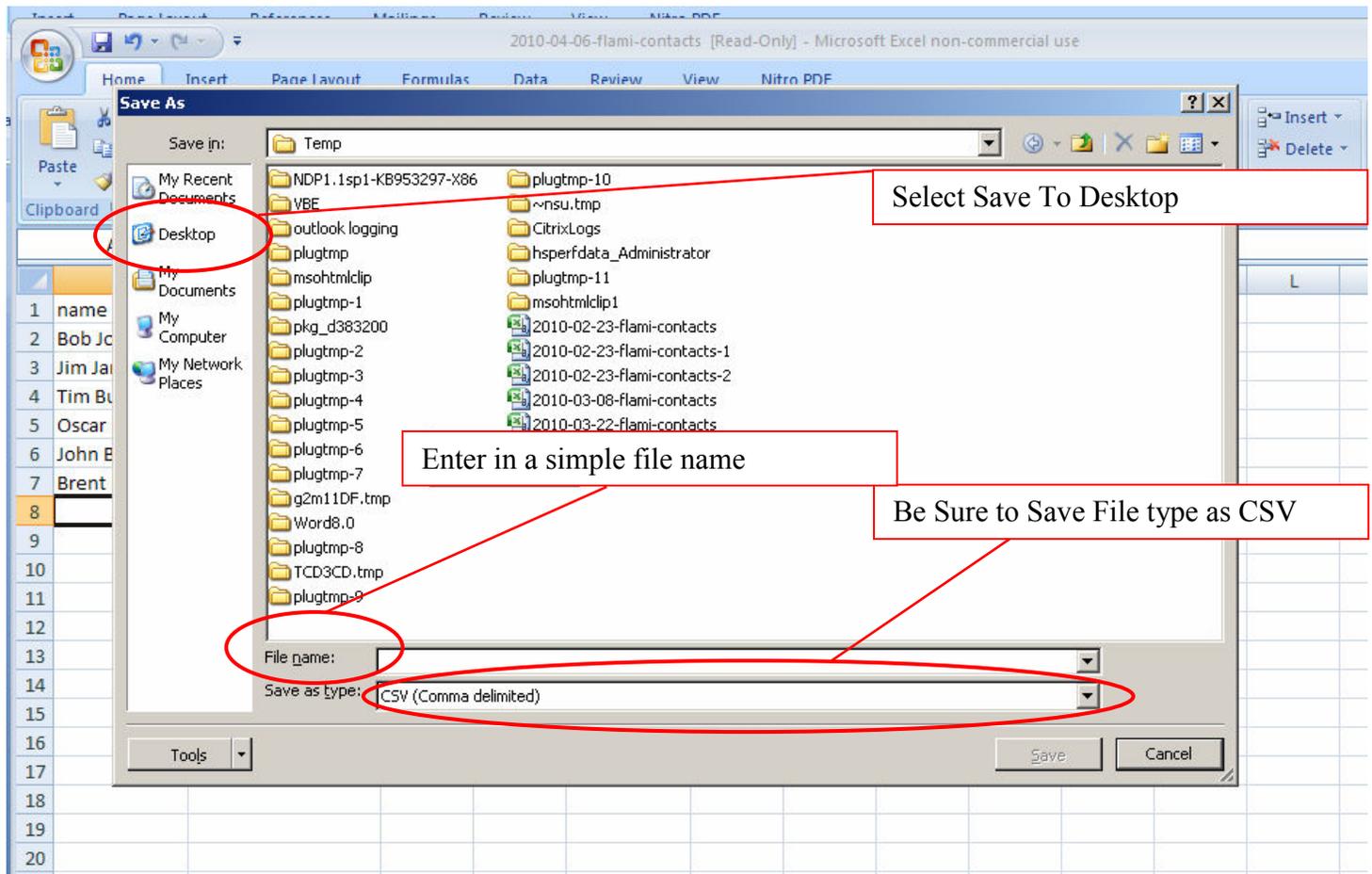
****NOTE- the billing code field is sortable in the contact screen - so if you are dealing with different peoples clients, under billing code you can enter the salesmen or account managers name associated with that contact- That way you can sort by whose client it is... Not necessary to do but some users find it a helpful feature.



Click File or this icon depending on what version of excel you are using.



Select Save As.



Now that we have entered our contacts into our CSV file and Saved the file to our desktop. We can import the contacts into AMI.

Click Import Contact List

Contacts Lists Sounds Text messages Call History

All Contacts

[Add new contact](#) [Import contact list via CSV file](#) [Export contacts as CSV](#)

Select	Name	Phone number	Action
<input type="checkbox"/>	Bob Jones	312-896-2071	

[Toggle Checkboxes:](#) Add selected contacts to List ID:

Click Browse...

Contacts Lists Sounds Text messages Call History

Import Contacts

File for import: (*)

Add to codes

Code	Description	Phone
	Spencer Client List (120540)	<input type="checkbox"/>

Find the list you saved to your desktop. Select it and click Open.

Contacts Lists Sounds

Import Contacts

File for import: (*)

File Upload

Look in: Desktop

- Lists 12-11-09
- PDF Documents
- pics
- PowerPoint Docs
- Publisher Documents
- QT Employee Agreements
- Word Docs
- AMI
- AMI Intro Message Folder
- AMI Jan and Feb bills
- AMI user guide
- futuresline
- GoToMeeting
- GoToWebinar
- LasalleSt2
- LGP
- new-presentation-screen
- QT PPT1
- QT PPT1 FINAL
- QTplus
- QTplus Pre-Release
- Shortcut to NFactory Nov12-2009
- SPENCERS LIST**

File name: SPENCERS LIST

Files of type: All Files

Contacts Lists Sounds Text messages Call History

Import Contacts

File for import: (*)
C:\Documents and Settings\ [Browse...]

Select lists to add imported customers to:

List Description	Phone
Spencer Client List (120540)	<input type="checkbox"/>

Check the box if you want to make these contacts a member of this list. Finally click 'Import Contacts'

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Contacts Lists Sounds Text messages Call History

Import Contacts

Import successful!

- 5 new records added.
- 1 records updated.

File for import: (*)
 [Browse...]

Select lists to add imported customers to:

List Description	Phone
Spencer Client List (120540)	<input type="checkbox"/>

Now all of your contacts have been added. If you go to the list view you can select contact list, and see which contacts are attached to that list.

5. How to create your own CUSTOM Intro or Outro message to be attached to each message you send out.

INTRO MESSAGE and CLOSING MESSAGE are to be attached on the front or back of every message you put out. Once recorded you can select which recording is to be placed on the front and back of each message you send out for each specific list. **This is part of the must have requirements by law per FTC regulations.**

PER FTC An introductory recording MUST contain the following information:

1. Company name or person name who is sending the message
2. Purpose of the call
3. Description of the service you're providing
4. Inform them that call recipients can press 1 at any time to be removed from the call list

Intro Example: "Hi this is Spencer Linn with your twice daily market commentary update, you can press 1 at any time during this message to be removed from this call list"

If you are using AMI to send out market commentary or Trade Recommendations I strongly recommend that you protect yourself and include a disclaimer per NFA regulations in your intro or "outro" / "closing message" to be attached to each message you send out.

Something along the lines of :

"The information contained herein is believed to be reliable or have been obtained from reliable sources, but we make no guarantee as to its accuracy or completeness. This letter is for informational purposes only and the opinions set forth herein should not be viewed as an offer or solicitation to buy or sell futures or options on futures. There is a risk of loss in the trading of futures and options on futures."

– Again this is just a standard example, but it should work fine if you are unsure.

NOTE: any list that does not have a intro message associated with their list will be sent out with the Standard Default AMI intro message currently being used on the system on lists that don't have intros set up.



[Admin panel](#) | [Logout](#)

Contacts | Lists | **Sounds** | Text messages | Call History

Sound files

An introductory message is required by the Federal Trade Commission in accordance with the guidelines defined by FTC Telemarketing Sales Rules and the Do Not Call Registry. Messages without a proper introduction will be sent with our generic opening statement.

[Record a new sound file](#)

Contacts Lists **Sounds** Text messages Call History

Record sound file

Important note:

An introductory recording MUST contain the following information:

1. Company name
2. Purpose of the call
3. Description of the service you're providing
4. That call recipients can press 1 at any time to be removed from the call list

Step 1: Enter sound information

Enter a descriptive name for this recording: (*)

Enter your phone number: (*)

Please re-enter your phone to confirm: (*)

Press here to start recording

[Back to sounds listing](#)

Enter a Descriptive Name for this Recording: Example, Spencer market commentary intro or Daves closing disclaimer.

Note when you enter in your Phone number, it is the number that you want to record the intro or closing message from. AMI will call that number and an automated voice will prompt you to begin recording.

After you click "press here to start recording" Your phone will ring – follow the process listed on the page.

Help

This page allows you to make a recording using your telephone that can then be attached to the beginning or end of all your recordings.

The process

1. Enter the file name and your phone number
2. Press "Record sound file"
3. AMI will call your number
4. Listen for the beep
5. Record your message
6. Review your message
7. Press "1" to save or "2" to re-record

Contacts Lists Sounds **Text messages** Call History

Recording beginning, you will receive a call shortly. If you do not receive a call within 5 minutes please check the number and try again.

Sound files

An introductory message is required by the Federal Trade Commission in accordance with the guidelines defined by FTC Telemarketing Sales Rules and the Do Not Call Registry. Messages without a proper introduction will be sent with our generic opening statement.

Important note:

An introductory recording MUST contain the following information:

1. Company name
2. Purpose of the call
3. Description of the service you're providing
4. That call recipients can press 1 at any time to be removed from the call list

[Refresh this page when you are finished recording](#)

Description	Action	Delete
Spencer's Closing Message	Recording	Delete sound
Spencer's Intro	Play Re-record	Delete sound

[Record new sound file](#)

Your introduction must contain this information per FTC guidelines.

Contacts Lists Sounds **Text messages** Call History

Sound files

An introductory message is required by the Federal Trade Commission in accordance with the guidelines defined by FTC Telemarketing Sales Rules and the Do Not Call Registry. Messages without a proper introduction will be sent with our generic opening statement.

Description	Action	Delete
Spencer's Closing Message	Play Re-record	Delete sound
Spencer's Intro	Play Re-record	Delete sound

[Record new sound file](#)

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Refresh your browser after you record your intro or closing messages. Or just click on sounds on the top menu file again and it will refresh. Now you will be able to view all of your intro/closing recording, play them, rerecord, and delete from here.

Contacts **Lists** Sounds Text messages Call History

Lists

Menu: [Add new list](#)

Description	List ID	View	Intro	Outro	Action
Spencer Client List	120540	Contact list	System default System default Spencer's Closing... Spencer's Intro	None	

Now go back to your list view by clicking LIST on the top menu bar

Select which recording you would like to be played on the front end (intro) and backend (outro) of each message by using the simple drop down menu.



[Admin panel](#) | [Logout](#)

Contacts Lists Sounds Text messages Call History

Sound file updated

Lists

Menu: [Add new list](#)

Description	List ID	View	Intro	Outro	Action
Spencer Client List	120540	Contact list	Spencer's Intro	Spencer's Closing...	

6. To send a voice message, call AMI (312-962-0436 or 630-413-9076), enter your particular list ID followed by # sign, leave your message at the beep, after your leaving your message press # sign to hear more options like replay, rerecord, or confirm and send. To send your message **press 9**.

7. **CALL HISTORY**- After a few minutes – Click ‘Call History’ on the menu bar – select the particular Call and view all the stats on who got your message.

QT Amii Automatic messaging interface

Logout

Contacts Lists Sounds **Call History**

Call History

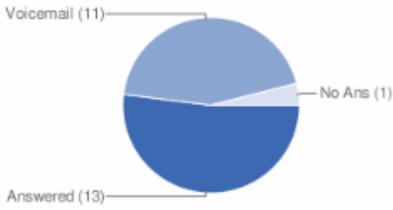
Here is a listing of your recent jobs.

Time	List	Code	Numbers Dialed
04/01/2010 12:15pm	AMI Weather Map Alerts - TEST	630445	32
03/31/2010 8:56am	AMI Weather Map Alerts - TEST	630445	32
03/31/2010 8:07am	AMI Weather Map Alerts - TEST	630445	32
03/30/2010 7:00am	AMI Weather Map Alerts - TEST	630445	32

Each Message Sent out will be listed here chronologically. By clicking on the specific “job” you can view a more detailed results page

Contacts Lists Sounds Call History

Call History



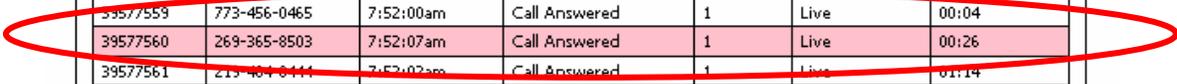
- First call start: 7:51:49am
- Last call end: 7:54:09am
- Average listen time: 1 mins 6 secs
- Total numbers in list: 25
- Calls that were answered: 13
- Calls that went to voicemail: 11
- Calls with no answer: 1
- Total time to place 24 calls: 0 m

0 Calls transferred 1 Unsubscribe requested

Ref ID	Number	Call Time	Call Status	Try Count	Mach Detec
39577538	612-670-1731	7:52:15am	Call Answered	1	Machine
39577539	773-244-9711	7:52:20am	Call Answered	1	Machine
39577540	312-852-1101	7:52:07am	Call Answered	1	Live
39577541	608-676-5482	7:51:58am	Call Answered	1	Live
39577542	515-681-6612	7:52:19am	Call Answered	1	Machine
39577543	217-638-1995	7:52:07am	Call Answered	1	Live
39577544	620-375-4519	7:52:39am	Call Answered	1	Live
39577545	309-688-6679	7:51:49am	Call Unanswered	3	
39577546	630-253-3622	7:52:05am	Call Answered	1	Live
39577547	630-607-2689	7:52:12am	Call Answered	1	Machine
39577548	312-213-8883	7:52:04am	Call Answered	1	Live
39577549	312-342-8899	7:52:18am	Call Answered	1	Machine
39577550	773-425-1903	7:52:07am	Call Answered	1	Live
39577551	561-313-6147	7:52:08am	Call Answered	1	Machine
39577552	312-408-8749	7:51:59am	Call Answered	1	Live
39577553	630-674-9755	7:52:21am	Call Answered	1	Machine
39577554	847-456-9697	7:52:27am	Call Answered	1	Machine
39577555	913-226-2301	7:52:06am	Call Answered	1	Live
39577556	765-426-0240	7:52:21am	Call Answered	1	Machine
39577557	630-253-3625	7:51:55am	Call Answered	1	Machine
39577558	312-718-4183	7:52:03am	Call Answered	1	Live
39577559	773-456-0465	7:52:00am	Call Answered	1	Live
39577560	269-365-8503	7:52:07am	Call Answered	1	Live
39577561	219-477-9167	7:52:02am	Call Answered	1	Live

Note the unsubscribe request in the history. It will be highlighted in Red. The numbers that pressed '0' to direct connect back to you will be highlighted in green. Unsubscribed numbers will be automatically removed from your list.

You can re permission unsubscribed contacts if it was found to be a mistake.. please see the next image.



<input type="checkbox"/>	John Isaacson	561-313-6147
<input type="checkbox"/>	K.T Arasu	312-408-8749 (Unsubscribed)
<input type="checkbox"/>	Kevin Schumacher	217-821-5382
<input type="checkbox"/>	Mark Bucaro	630-674-9755
<input type="checkbox"/>	Matthew Garell	847-456-9697
<input type="checkbox"/>	Mike Duffy	901-237-1684
<input type="checkbox"/>	Peter Grady	913-226-2301 (Unsubscribed)
<input type="checkbox"/>	Roys quy...	312-331-0074
<input type="checkbox"/>	Spencer Linn	630-253-3625
<input type="checkbox"/>	Steve Zuber	312-718-4183
<input type="checkbox"/>	Terry Linn	773-456-0465
<input type="checkbox"/>	Tom Grisafi	219-477-9167
<input type="checkbox"/>	Wayne Park	509-948-0650

Toggle Checkboxes: Add selected contacts to List ID: 630445

When going to your Contacts menu tab, you will see all those that unsubscribed highlighted in red. You can view this in both the contact menu screen as well as by clicking on the LIST menu tab, then selecting the appropriate Contact list.

To place the customer back on your call list, click on the contacts name.

Contacts Lists Sounds Call History

Edit Contact

This customer is on your do not call list.
[Click here to take this customer off your do not call list](#)

Name: (*)

Phone Number: (*)

Company:

Email Address:

Billing Code:

Assign contact to lists

List name	Member	Custom transfer number
AMI Weather Map Alerts - TEST (630445)	<input checked="" type="checkbox"/>	<input type="text"/>

After clicking on the contacts name you will see this screen. To take them off the do not call list, simply click the blue link. The individual is now back on your call list.

8. Text Messaging – Note Text messages can only be sent to cell phones.

Contacts Lists Sounds **Text messages** Call History

Send text message (SMS)

From email address:

Message:

Also send email

Text message live preview:

```
FRM:sales@qtinfo.com
MSG:This is a test this is a test this is a test.
```

Characters remaining: 89

Select list(s) to send to:

List Description	Select
120540 Spencer Client list	<input type="checkbox"/>

Click to send the message

Check this box to also send an email, Note this option will only work if you had entered emails for each of your contacts.

Check the box to select which list you want to send the message to.