

## BrightArrow ExecutiveAssistant Find Me Follow Me

The flexibility and power of the Find Me Follow Me feature in BrightArrow's ExecutiveAssistant is different from features with this name of this type on other phone systems. In most of the other brands of phone systems, what they call "Find Me Follow Me" is usually Call Forwarding with a few enhancements. On non-3Com systems, you sometimes are offered multiple number call forwarding, but that is not even scratching the surface of the Find Me Follow Me that BrightArrow offers with ExecutiveAssistant.

*Top ten reasons why ExecutiveAssistant Find Me Follow Me is better than the basic version of that feature available on most phone systems:*

- 1) If you are not available on your cell phone, the call is pulled back to your NBX voice mail box (although you can choose to still send the voice mail to the remote phone's voice mail).
- 2) If you want it to try you on multiple phones (such as cell and home, or cell and colleague's cell), it can try multiple phones and still pull the call back to your NBX voice mail box.
- 3) If you turn on Call Screening for the Away State, you can be told the name of the person who is calling before you decide whether to accept the call.
- 4) If the call has Recording (always or on-demand) enabled, additional features include:
  - a. Caller can hear your special audio-on-hold (including caller opt-out) while system is trying to find you.
  - b. Remote (cell phone) call can be recorded or monitored.
  - c. In ExecutiveAssistant 6.0, PBX features from cell phone, such as transfer and conference, are available from remote phones such as cell phones.
- 5) If doing Find Me Follow Me for a department, it can be set to Linear or Circular "finding" – that latter option designed to have it try to call the "next" person in the list every time a new call arrives.
- 6) You can set speed-dials on your cell phone to change your Away State dynamically. For example, you can change your Away State from "Available Wireless" to "In a Meeting" with a single speed dial. That way, you don't receive calls, but the caller is explained why.
- 7) You can choose to have only some callers ring you via Find Me Follow Me while others are sent right to your voice mail box, based on caller priority as matched by their spoken name (and thus not reliant on their Caller ID number).
- 8) On some away states, such as home phones, you can require the recipient to enter a PIN so that other people (or children) who answer the calls cannot pick up your business calls.
- 9) You have the option of using the Hot Desking feature of ExecutiveAssistant from a remote phone so that you can automatically receive calls from any location by dialing in and logging in from the remote phone.
- 10) An unlimited number of Away States, any combination of which can be selected at any time.

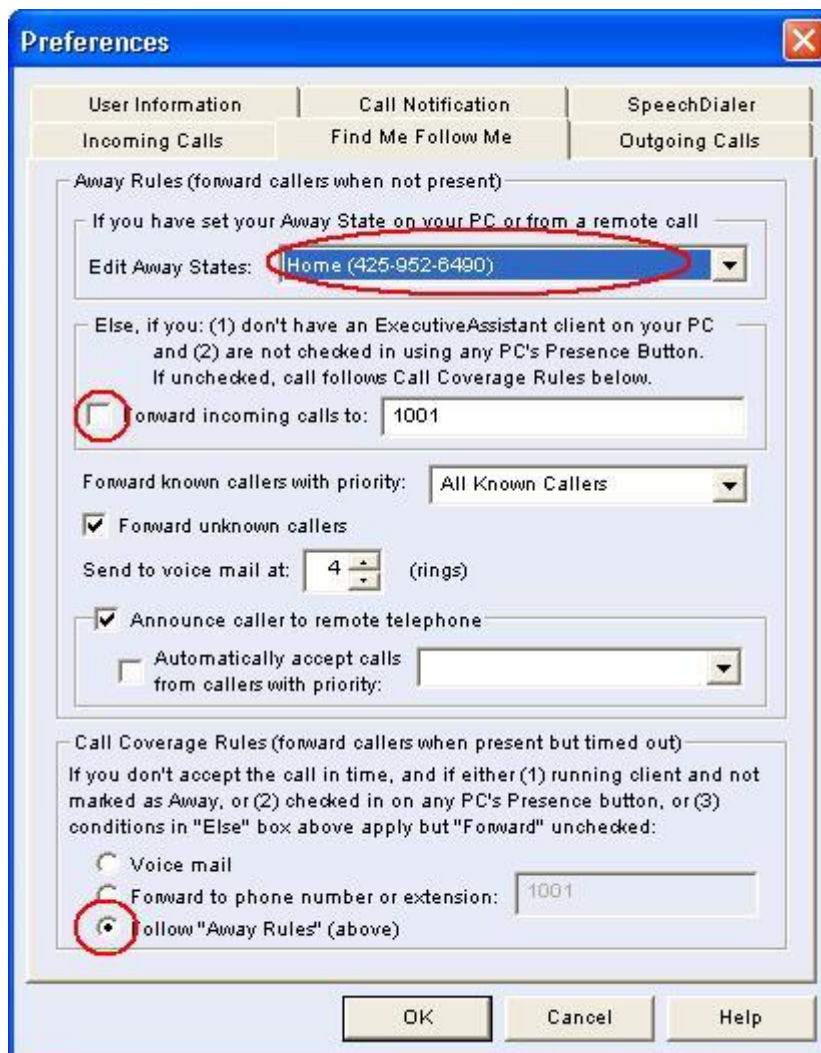
There is no more powerful way to sell a feature than to show your prospect how useful it is for you. To that end, I would like to share with you details of some common ways to configure BrightArrow ExecutiveAssistant Find Me Follow Me. If you haven't already, I would suggest that you consider setting up your in-house NBX to use Find Me Follow Me for yourself, with one of these options.

### **Configuration A: Ring to your desktop phone, unscreened, when present; follow your active Away State when away from desk; control present state from PC screen**

The idea here is that the software rings your telephone when you are at your desk, but the system tracks you down when you are away. To configure the system, leave the Screen My Calls setting at the default "No Screening."



Then click on Find Me/Follow Me button, followed by "Away Settings" to open up the following screen:



Leave the settings default, except for the three items circled in red.

To accomplish this objective, when you arrive at the office, you start ExecutiveAssistant. When you leave your desk, you can either exit the program or click on Find Me Follow Me.

If you step away from your desk and forget to press Find Me Follow Me, you can call in from outside and change your Away State remotely. For fast status changes, you can pre-program DTMF sequences from your cell phone to automatically match different Find Me Follow Me Away States.

**Configuration B: Ring to desk when present; follow active Away State when away from desk; control present state using telephone (desktop and/or cell phone)**

This is the way of using Find Me Follow Me without running the software at your desktop PC, except for the time you (or an administrative assistant) initially set it up. You control your Away States entirely from your desktop telephone by setting a speed dial on your telephone that is sent to EA's "Set Away State" hunt group.

You mark yourself as present when they arrive by pressing your Set Away State speed dial on your NBX telephone and choose Zero (0) as the chosen Away State.

When you step away from your desk, you can press their Set Away State speed dial and choose the appropriate Away State. You can choose among some of the default options such as "Away From Office," "Send To Wireless," "In A Meeting," "Sent To Home," "Vacation." Or you can create options specific to where they might be, such as "Out To Lunch," "In Court," or "Away On Business Trip." Ultimately, each Away State is assigned a number that is used for you to change your Away State using your desktop phone. This is set in the "Shortcut Touch Tone" field shown in red:

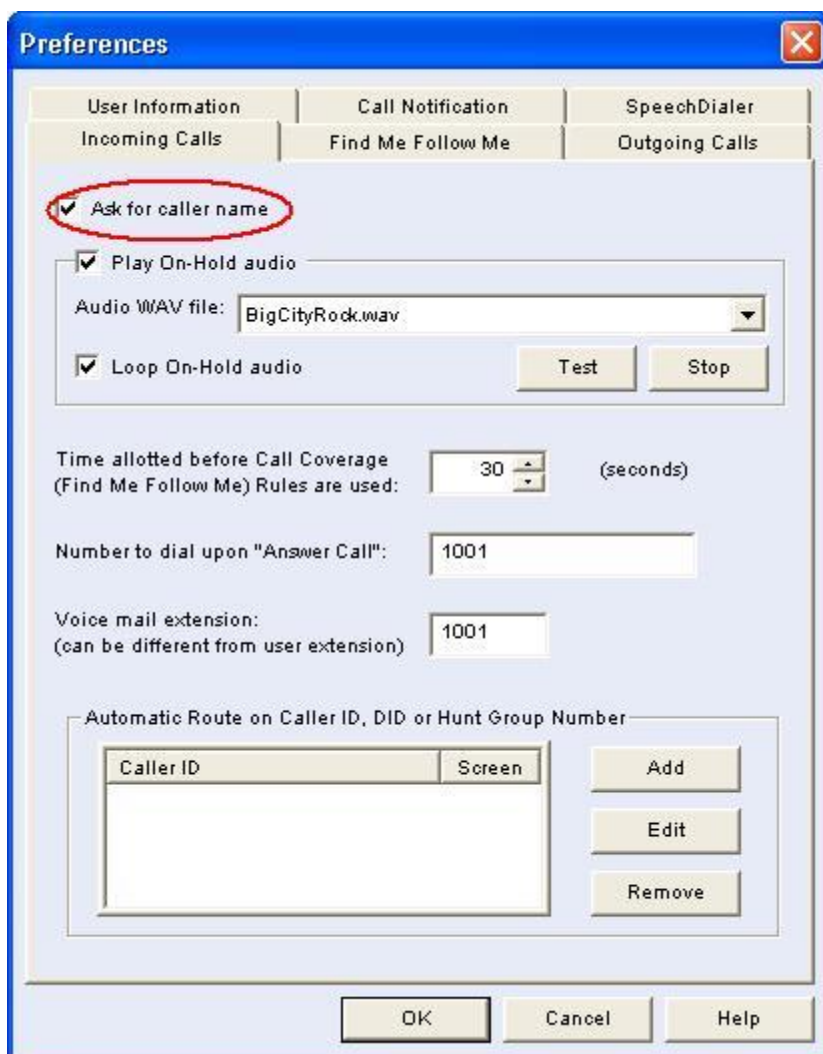
The screenshot shows the 'Away State' configuration window. The 'Option Name' is 'In a Meeting'. The 'Shortcut Touch Tone' is '3', which is circled in red. The 'Forward To Phone' checkbox is unchecked. The 'Phone Number' field is empty. The 'Play Prompt Before Sending To Voice Mail' checkbox is checked. The 'Voice Prompt To Use' dropdown is set to 'In A Meeting'. There are 'Edit Voice Prompts' and 'Play' buttons. The 'Screening' section has 'All or Some' selected. The 'Proceed To Next Away State If Not Accepted' checkbox is unchecked. The 'Circular' checkbox is unchecked. The 'Require Touch-Tone To Accept Call' checkbox is unchecked. The 'Require PIN To Accept Call' checkbox is unchecked. At the bottom are 'OK', 'Cancel', and 'Delete' buttons.

Your cell phone can be used to call in and change your Away State as easily as your desktop phone. Therefore, if you forget to change your Away State when you leave your office, you simply need to press the appropriate speed dial on your cell phone.

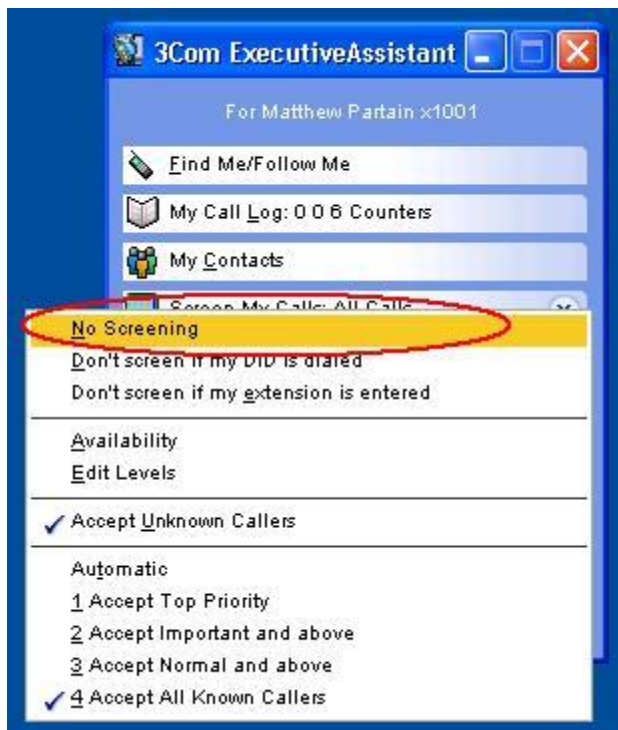
### Configuration C: Announce calls at PC when present; follow active Away State when away from desk

This is the way I use ExecutiveAssistant's Find Me Follow Me. I find it very helpful for EA to announce a new caller on my PC (and PC's speaker), because many times a call arrives I am on the phone with somebody else. It lets me much more effectively handle multiple calls than having a 2<sup>nd</sup> call appear only on a telephone. This is because I get better information about who is calling (by optionally asking for the caller's name), and they are played my customized audio-on-hold so that they are held long enough for me to finish my current call.

This is the best configuration for people who are on the phone a significant percentage of the day, managing multiple calls. It makes use of the PC's speaker as a paging mechanism for new calls, without disrupting the current call. You can also choose whether you want to ask the caller their name. If you do, then you have maximum information about the caller. If you don't the call is still presented to you at your PC, but only with Caller ID information. You can choose whether to ask for the caller's name using the checkbox marked in red below:



To make sure the call is presented to the PC instead of going to the telephone, you click on "Screen My Calls" on the main screen, and Uncheck "No Screening" as shown here:



Finally, when you step away from your office, you click on Find Me/Follow Me from the main interface and can choose your current Away State. If you filled in the Find Me Follow Settings button as in Configuration A, then the system will follow your current Away State when you press it, but also when you are not running the software at all.

### **But Wait, There's More**

As you probably can imagine by looking at the various Find Me Follow Me options, there are many different ways to configure this feature. Over the years, so many different special scenarios had to be accomplished that the interface has quite a range of options to allow those varied requirements. The above examples are the three most common ways of configuring Find Me Follow Me, but there are many more.