Using VmX Locator with Follow Me

Some people like to have all calls follow them and ring all their phones in a sequence. Others prefer to not be bothered by every call and use voicemail as a way to get messages and then sort through for ones that may require more immediate action.

Zerabox has a built in VmX Locator which will allow callers to take further actions after they have been routed to voicemail. If the caller needs attention immediately they will get options to move back out of voicemail and be able to take choices which will route the call either to a cell phone or back out to a live attendant person, like follow-me, but without the definite sequence. Zerabox offers both of these two different features that are designed for different scenarios.

Making Follow Me and VmX Locater Work Together

These two powerful features are designed to work together so you can have the ultimate solution for your personal needs. Instead of choosing one or the other, why not have the caller choose what they want: leave voicemail now, or try to locate you.

Start your particular setup by thinking about the particular situations that might occur.

Desired Call Flow

- When a Caller calls and we are not in the office, we would like to send them to the voicemail system and present the *unavailable* greeting along with options to locate us if desired. If we are on the phone we would like them sent to the *busy* greeting and not present any options but voicemail. (If we had chosen to take the call, we would have done so on our Multi-Line or Call Waiting enabled phone.)
- In the *unavailable* case, we instruct the caller that they may leave us a message now, or if urgent, they can choose one of few more choices and the system will try to find us. This could be initiated by pressing 1.
- If the caller does not consider this urgent, they will leave a message with voicemail and the call is completed.
- If the caller does consider this urgent, they choose option 1 and are sent to the *Follow Me* setup.
- The *Follow Me* configuration attempts to find you, but if not successful then it returns to voicemail, this time to the *busy* greeting where they no longer have an option to keep trying to find you. In your *busy* message you indicate you are not reachable at this time and they must leave voicemail or try again later.

Create the Messages

Let's begin. Here are a couple of examples for the *Unavailable* and *Busy* messages:

Unavailable: *"I am not able to get the phone right now. You can leave me a message after the beep or if this is urgent, you can press 1 now to have the system try to find me. If it can not find me you will be returned here to leave me a message"*

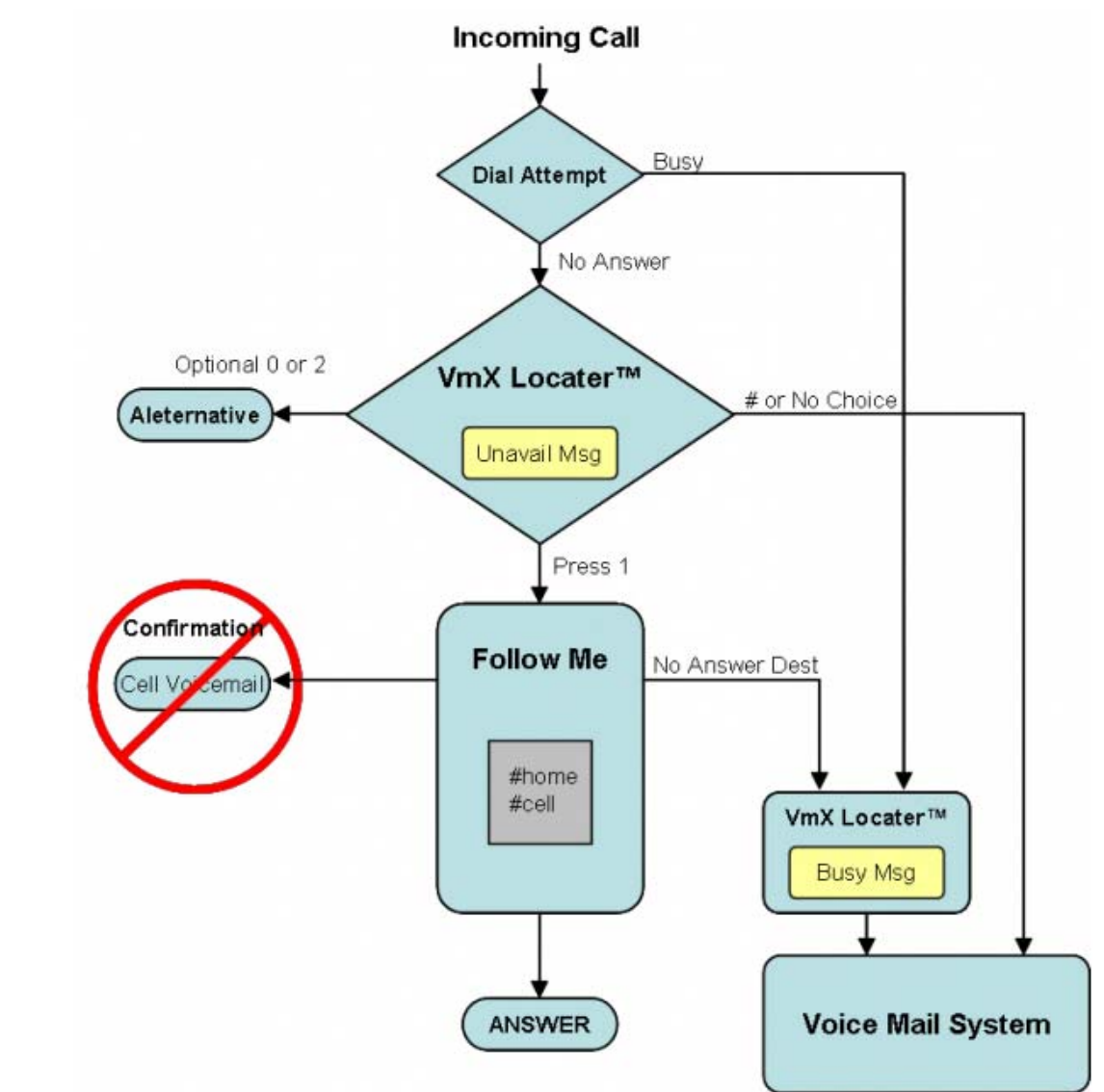**Busy:** *"I am either on another line or not reachable at this time. Please leave me a message after the beep."*

Figure 1

Now that we have the two messages, we will set out to configure what was described above. The flow chart in Figure 1 describes our desired behavior.

Voicemail & Directory

Status	Enabled
Voicemail Password	200
Email Address	
Pager Email Address	
Email Attachment	○ yes ● no
Play CID	○ yes ● no
Play Envelope	○ yes ● no
Delete Vmail	○ yes ● no
VM Options	
VM Context	default
VmX Locater™	Enabled

Submit

First enable both the Follow Me and VmX Locater features in the Administration GUI. Navigate to the desired extension/user GUI screen and enable the VmX Locater feature. We will use extension 200 in our example. You will need both Voicemail Status Enabled and VmX Locater™ Enabled as shown in figure on the left.

Figure 2

Edit Follow Me

Disable as Default:	☐
Initial Ring Time:	7
Ring Strategy:	ringallv2-prim
Alert Info:	
Confirm Calls:	☐
Remote Announce:	Default
Too-Late Announce:	Default
Follow-Me List:	200

Clean & Remove duplicates

CID Name Prefix:	
Ring Time (max 60 sec):	20
Announcement:	None
Play Music On Hold?	Ring

Destination if no answer:

○ IVR: My IVR
○ Time Conditions: my test
○ Queues: MyOperator <0>
○ Terminate Call: Hangup
○ Extensions: <0012> Jerry Jones
● Voicemail: <200> John Smith (busy)

Next create the initial Follow Me feature as shown in Figure 3. So while you are in the Extension/User GUI, click on the Add Follow Me Settings click on the Add Follow Me Settings (or Edit Follow Me Settings if one already exists). You should see a screen similar to Figure 3.

The important items to set here are the desired Ring Strategy and the Destination if not answered. (These can not be set in the User Portal). To accomplish the goals we have set, you will want to choose the Voicemail <200> John Smith (busy) Destination. The remaining settings will be configured in the User Portal.

Figure 3

Configure the Features in the User Portal (ARI)

Navigate to the ARI User Portal to complete the final configurations. Log into the User Portal Recording Interface. (This should show as the Recordings tab at the top of the main screen, or navigate to it directly). Next choose Follow Me on the Left Navigation section. Figure 4 shows an example of what we have chosen to configure.

Figure 4

Enable: **Unchecked**; this means that phone calls will not automatically be sent to our Follow Me setup. This makes it only accessible through the VmX *Locater*.

Follow Me List: Here is where you list the numbers that you want in the Follow Me list. Note that we must include our own extension if we want it rung as well. Also note that there is no '#' required at the end of an external number. The system figures this out by itself.

Ring First For: We like the initial ring time. This is not really necessary in the example we are describing but makes it more convenient if you like to switch back and forth between using Follow Me directly or only through the VmX Locater. You can leave it at 0 if it does not apply to you.

Ring Follow Me List for: Make sure this time is long enough for the user to answer their cell phone and press 1 to confirm the call if using confirmation.

Use Confirmation: Checking this box will assure that all calls sent to an outside line (vs. internal Zerabox extensions) will require the user to confirm the call by pressing 1. This keeps calls from dropping into cell phone voicemail, answering machines or other undesired landing spots.

That provides our desired Follow Me configuration. We must next setup the VmX Locater configuration. Choose the VmX™ Locater menu option and you will be presented with a screen as shown in Figure 5.

The following options have been configured as follows:

Use When: By checking unavailable, but not busy, you are configuring the system as drawn in Figure 1. If the phone is busy, or the caller has already flowed through the Follow Me process and was sent to the busy destination, if no answer; then you do not want them to be able to choose to keep trying your Follow Me.

Voicemail Instructions: This is a personal preference. If checked the caller will be presented with the standard voicemail system instructions concerning leaving a message, reviewing their message, etc. after playing your greetings. Un-checking this box will disable that system message.

Press 0: If you have a personal assistant or an alternative choice for what to do when a caller presses 0, you can uncheck this box and provide the number here. Otherwise the system default for *zero-ing* out of voicemail will be used.

Press 1: Checking the *Send to Follow-Me* is what does our magic and makes sure that this option gets sent to *Follow Me* even though we had disabled it in the previous section.

Press 2: If too many options are presented it may become cumbersome, but actually the system is capable of even more options, but keeping to best practices you should limit them so that callers find the experience usable. Some people actually choose to use this option but not "announce" that it is available.