



Set CallerID

User Guide

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Overview

The Set CallerID module is a simple and effective way to manipulate callerID to help identify who is calling, use the proper greeting for a caller, give priority or even handle calls from multiple companies. The module allows you to change the callerID of a call and then continue on to the desired destination.

Logging In

- Log into the Set CallerID module and you should see a screen like this. The primary screen allows you to set a new CallerID Instance and on the right side, you will see a list of existing CallerID Instances.

Add CallerID

Add CallerID
Sales CID

Set CallerID allows you to change the callerID of the call and then continue on to the desired destination. For example, you may want to change the callerID from "John Doe" to "Sales: John Doe". Please note, the text you enter is what the callerID is changed to. To append to the current callerID, use the proper asterisk variables, such as "\${CALLERID(name)}" for the currently set callerID name and "\${CALLERID(num)}" for the currently set callerID number .from-did-direct,4001,1

Add CallerID Instance

Description:

CallerID Name:

CallerID Number:

Destination:

== choose one ==

Setting a CallerID

- Set CallerID-** This module has four customizable fields.

Add CallerID Instance

Description:

CallerID Name:

CallerID Number:

- Description-** Enter a descriptive name for this CallerID Instance. Example: "Sales CID"
- CallerID Name-** The name of the callerID that you want to change to. If you are appending to the current callerID, don't forget to include the appropriate variables. If you leave this box blank, the CallerID Name will be blanked. Default CID Name Variable: **`${CALLERID(name)}`**
- CallerID Number-** The number of the callerID that you want to change to. If you are

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appending to the current callerID, don't forget to include the appropriate variables. If you leave this box blank, the CallerID Number will be blanked. Default CID Number Variable: **`${CALLERID(num)}`**

Destination:

- **Destination**- Choose the target destination to continue the call.
- Remember to press the "Submit Changes" button to save your CallerID Instance.

Submit Changes

Example: Set CallerID Name

- **Example CallerID**- For our example, we will change an IVR destination to include the prefix "Sales:" in the CallerID Name and then assign that as a destination target on a sample IVR.

Edit CallerID Instance

Description:

CallerID Name:

CallerID Number:

- **Description**- Enter description as "Sales CID."
- **CallerID Name**- Enter "Sales:" before the CallerID Name variable.
- **CallerID Number**- Leave the CallerID Number variable as the default.

Destination:

Extensions

Submit Changes

Delete

- **Destination**- Enter the destination for the call. In our case, we will choose extension 4001.
- Remember to press the "Submit Changes" and "Apply Config" buttons.

Submit Changes

Apply Config

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- **Configure your IVR-** In our example, we will configure an IVR option with the Set CallerID target. Calls will hit the Set CallerID destination, and then continue on to the final extension 4001 destination.

- IVR Entries

Ext	Destination	Return ?	Delete
1	Set CallerID	<input type="checkbox"/>	

- **IVR Option-** Set the destination of IVR entry “1” to “Set CallerID” and “Sales CID” that we just configured above.

Example: Set CallerID Number

- **Example CallerID-** For our second example, we will be modifying the number of the incoming callerID to include the proper dialing prefix for a specific outbound route, enabling easy redialing of incoming calls.

Edit CallerID Instance

Description:

CallerID Name:

CallerID Number:

- **Description-** Enter description as “Outbound Prefix 9.”
- **CallerID Name-** Leave the CallerID Name variable as the default.
- **CallerID Number-** Enter a “9” before the CallerID Number variable.

Destination:

- **Destination-** Enter the destination for the call. In our case, we will choose extension 4001.
- Remember to press the “Submit Changes” and “Apply Config” buttons.

Example: Set CallerID with Number Manipulation Rules

- **Example CallerID-** For this final example, we will add validation rules to the CallerID Number field that will strip the local area code. This is useful if you receive inbound calls via paid SIP trunks, but want to easily redial local numbers out of unlimited local POTS lines. In this case, our local provider allows us to call area codes “843” as a local 7 digit number. So any calls that come in with an “843” area code will be stripped of the “843” and delivered as a 7 digit number.

Edit CallerID Instance

Description:

CallerID Name:

CallerID Number:

- **Description-** Enter description as “Local Numbers CallerID.”
- **CallerID Name-** Leave the CallerID Name variable as the default.
- **CallerID Number-** `{IF(${CALLERID(num):0:3} : "843"] ? "${CALLERID(num):3}" : "${CALLERID(num)}"`

Destination:

Extensions

- **Destination-** Enter the destination for the call. In our case, we will choose extension 4001.
- Remember to press the “Submit Changes” and “Apply Config” buttons.

- **NOTE:** Validation Rules can also be used to correct CallerID Number formats that are not provided in a scheme that can be routed back out when redialing. It is also useful when receiving international calls to auto append an international dialing prefix to your callerID so call returns are routed correctly.

Tips & Tricks

Setting an additional CallerID Name Prefix will be appended to the original. So, if you set “Sales:” on your incoming route, then at some other point in the call flow you add another prefix; it will append to the original name. In this format: **Setcalleridnameprefix:**
Inboundboundroutenameprefix: Carrier Provided CID name



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