Caller ID Tracker

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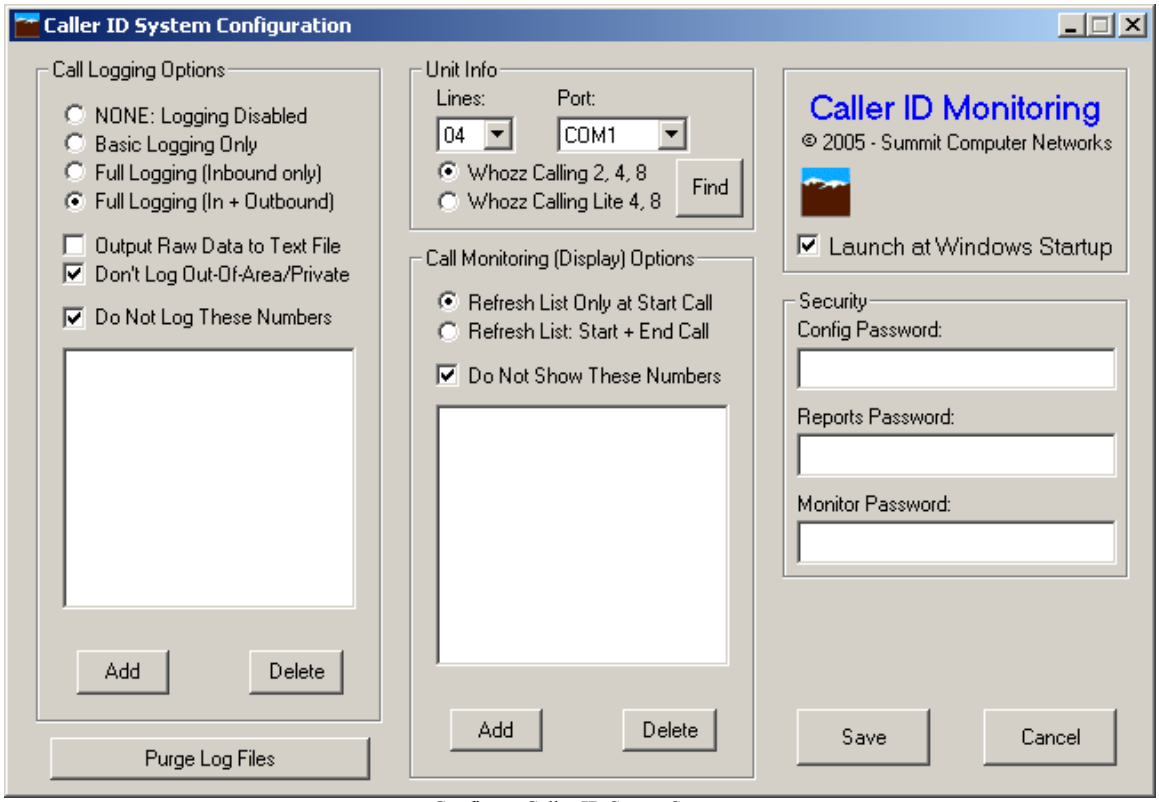
This is a caller ID monitoring & logging system to be used with Windows based PCs. This software is for use with the Whozz Calling caller ID units available from www.callerid.com . This software supports the 2, 4, or 8 Whozz Calling units and the Whozz Calling Lite units. The software will log inbound and outbound calls, and allow you to view reports of inbound, outbound, calls by number, or call statistics from the data logged by the software.

Getting Started:

You should install the software on the machine that has the Whozz Calling box attached to its' serial port. Only 1 caller id unit is needed on network installations.

Once the software is installed, launch the Caller ID Server for the first time by going to the "Start" button, then "Programs" (or All Programs), then "Caller ID Tracker" and then "CID Server". The server will launch to the windows tray (on status bar near clock) and is a black telephone icon. Right-click on this and first verify that there is NO check mark next to the "Caller ID Server Running" item. If there is, then click that item once to stop the server. Choose the "Configure Caller ID Server" item on the right-click menu.

You will come to the main server configuration screen (pictured below).



Configure Caller ID Server Screen

This is where you will setup your primary options for the caller ID server.

Unit Info: This is the first section that we will cover since it is directly responsible for the server being able to talk with the Whozz Calling unit. Select the com port where the unit is attached, the number of lines that the unit supports, and the type of unit. If you have a Whozz Calling (not a lite unit), you can use the "Find" button to scan the com ports for the unit.

Call Logging Options: This will set your logging options for the software. The Whozz Calling Lite units do not have as many options available as the standard units. You can also create a list of telephone numbers to be excluded from the logs. The telephone number list does not effect the raw output data since it is raw data directly from the unit.

Call Monitoring Options: The call monitoring options determine what data and when will be sent to the client (monitor) software. You can also set a list of telephone numbers here that will not be shown to the monitor.

The last part of this screen allows you to set the server to **Launch at Windows Startup** (recommended) and any passwords that you would like to set. If you set any passwords, be sure that you will remember them, especially the Config Password, because it will be needed to change the settings again in the future. Leaving a password field blank will disable the password for that option.

You can also purge entries from the log file that are older than **x** number of days old.

Once you have made all of the changes as needed, click on the Save button to write the changes to disk.

Now, return to the right-click menu and select the "Caller ID Server Running" option. This will place a checkmark next to the item and begin servicing calls.

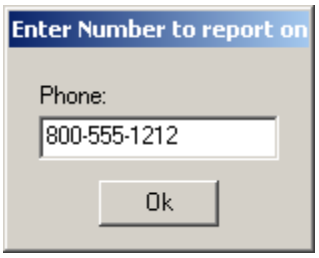
The server will automatically start in the running configuration whenever it is launched. You can change most of the configuration settings while the server is running.

Reports:

The Caller ID monitoring system also gives you several reports that it obtains from your log data. To access the reports right-click on the server icon in the system tray and then choose the "View Caller ID Reports" option from the popup menu. If you have a reports password set it will be required here.

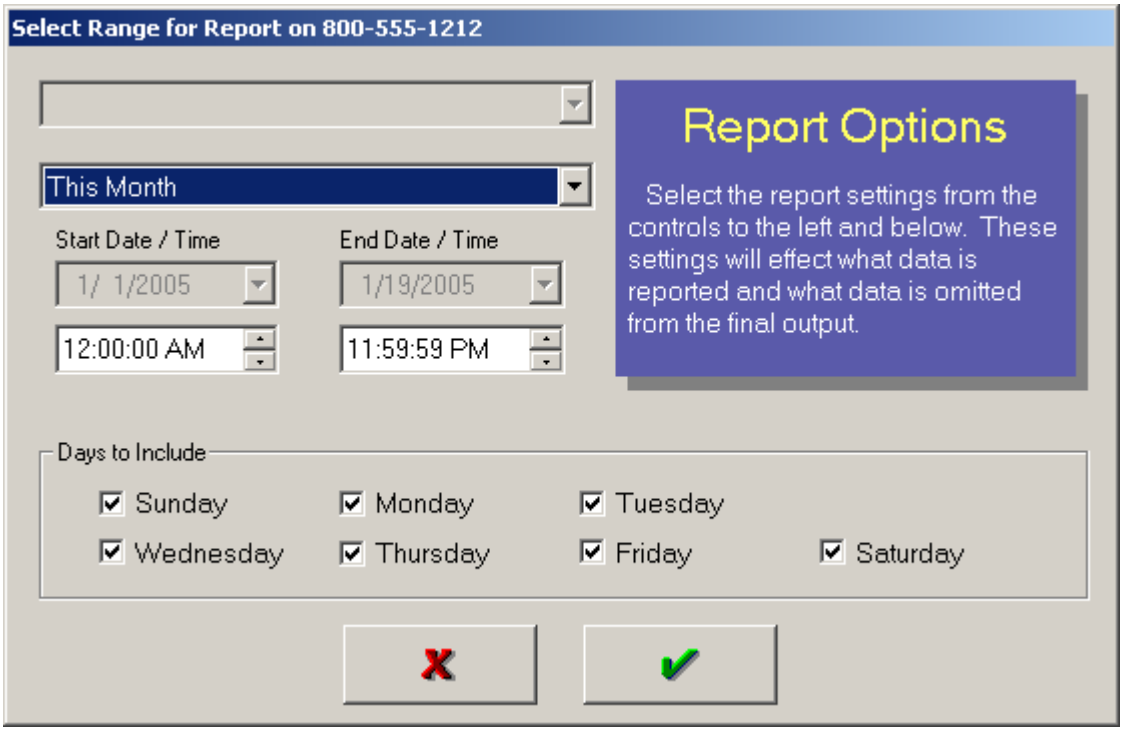
Once you choose to view the reports a small window with several buttons on it will appear. Choose the report that you want by clicking on the appropriate button.

If you choose the **Rept by Phone #** button you will see a window like the one below.



Enter the phone number that you want to report on in this box and click the OK button. Spaces or dashes do not matter. After clicking the ok button, you will see the report selection screen.

All of the other reports will show the report selection screen shown below.

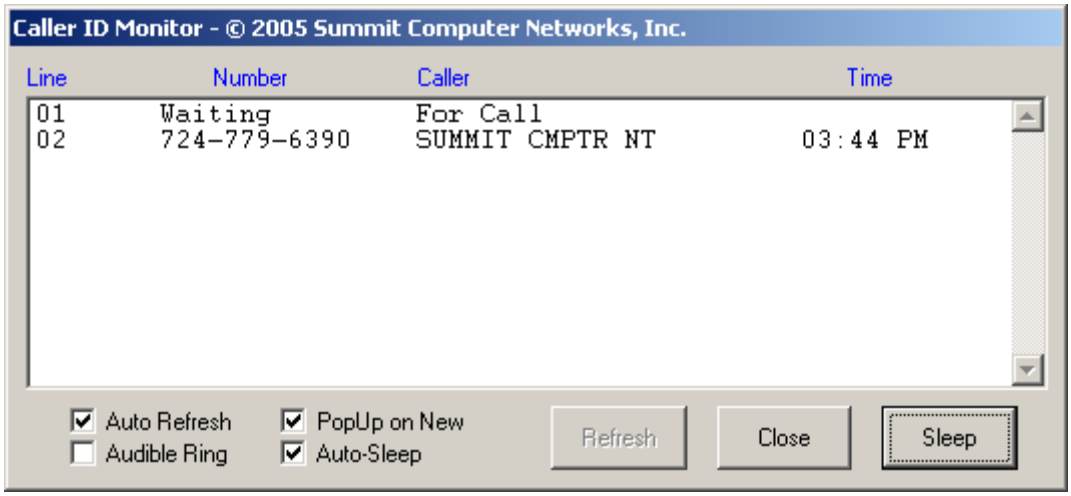


On this screen you can choose the Date & Time range for the report as well as which days of the week that you want to include. Once you have picked the options for your report, click on the green check button to view the report.

Each report will open up in a viewer where you can view it on screen. From here you can save, or print the report.

Caller ID Monitor (Client):

The Caller ID Monitor is the client part of the software package and can be shared on a network and run on multiple stations simultaneously. The client can be configured at each workstation by checking the options checkboxes on the main screen.



Caller ID Monitor Screen

Each call will be shown in the box above, which can be launched automatically at a new call or manually be double-clicking on the tray icon (near the clock in Windows). Each option will be saved locally and will be recalled when the program is started.

Auto Refresh – This will cause the window to be refreshed every 2 seconds automatically.

Audible Ring – This will cause the PC to play a ringing sound whenever a new call is received.

PopUp on New – This will cause this window to automatically open from its closed state whenever a new call comes in.

Auto-Sleep – This will cause the window to close about 5 to 10 seconds after the new call has been displayed.

To run this program from a computer other than where it was installed, open the network and find the computer where the program is installed. Right-drag the CIDMon (yellow phone icon) to the desktop, and then select "Create Shortcut Here" on the popup menu. You can now use this newly created icon to launch the Caller ID Monitor.

You can copy the shortcut to the "Startup" menu in Windows to have the program auto-start whenever Windows is booted up.

If you are trying to run this program from the computer that the package was originally installed on, click on the "Start" menu, then go to "Programs" or "All Programs" and then "Caller ID Tracker". Find the Call Monitor icon here and click on it.

Summit Computer Networks offers free technical support for this program by email, our online forums, or by telephone. You can call support at 724-779-6390.

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This software may be purchased at www.summitcn.com

Visit our online forums at www.forums.summitcn.com

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