

Whozz Calling? Deluxe 2,4,8 Caller ID Interface



Product Manual

Revision 5.0 - 11/15/2015
(SMT Versions)

Whozz Calling? 2, 4, and 8 Line Deluxe Units

Product Manual

Revision 6.1 - 01/27/2020
(SMT Versions)

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INTRODUCTION

The Whozz Calling? Deluxe units capture all details of inbound and outbound calls and send this information to a computer via RS232 serial port or Ethernet link depending on the model purchased. If Ethernet, also refer to the [Ethernet Link Supplement](#).

Deluxe units can be set to deliver only inbound Caller ID, ignoring all outbound dialed numbers. Or, both inbound and outbound data can be sent for complete call accounting applications. Data records are sent just as the call begins, just after the call ends, or both at the beginning and the end of the call depending upon the unit's configuration. Deluxe units are also capable of sending real-time, detailed events occurring on each telephone line such as Ring, Off Hook, and On Hook.

Models equipped with relays are capable of blocking select incoming calls, based on the Caller ID number, from passing through to the output jacks. This feature can be accomplished by dynamic control from the application software or by pre-loading blocked phone numbers into the unit's memory. First ring suppression to the output jack also can be performed with relay-equipped models. Selecting this option prevents office employees from answering the telephone too quickly and thus preventing the Caller ID signal from being delivered.

The Whozz Calling? Deluxe unit uses setup toggles to determine how the unit will operate. The toggles are either upper or lower case letters and are stored in non-volatile memory. For information on unit toggles, please refer to page 4. Operating commands are used to list the setup parameters, see the phone number list used for call blocking, and to reset the system. The Send Data commands are used to set line numbers, set the internal clock, and enter phone numbers for call blocking.

The manual gives a brief discussion of the setup toggles, commands, and data formats. An in-depth discussion is provided for all setup toggles, commands, and data formats, along with a discussion of Private and Out-Of-Area Caller ID types.

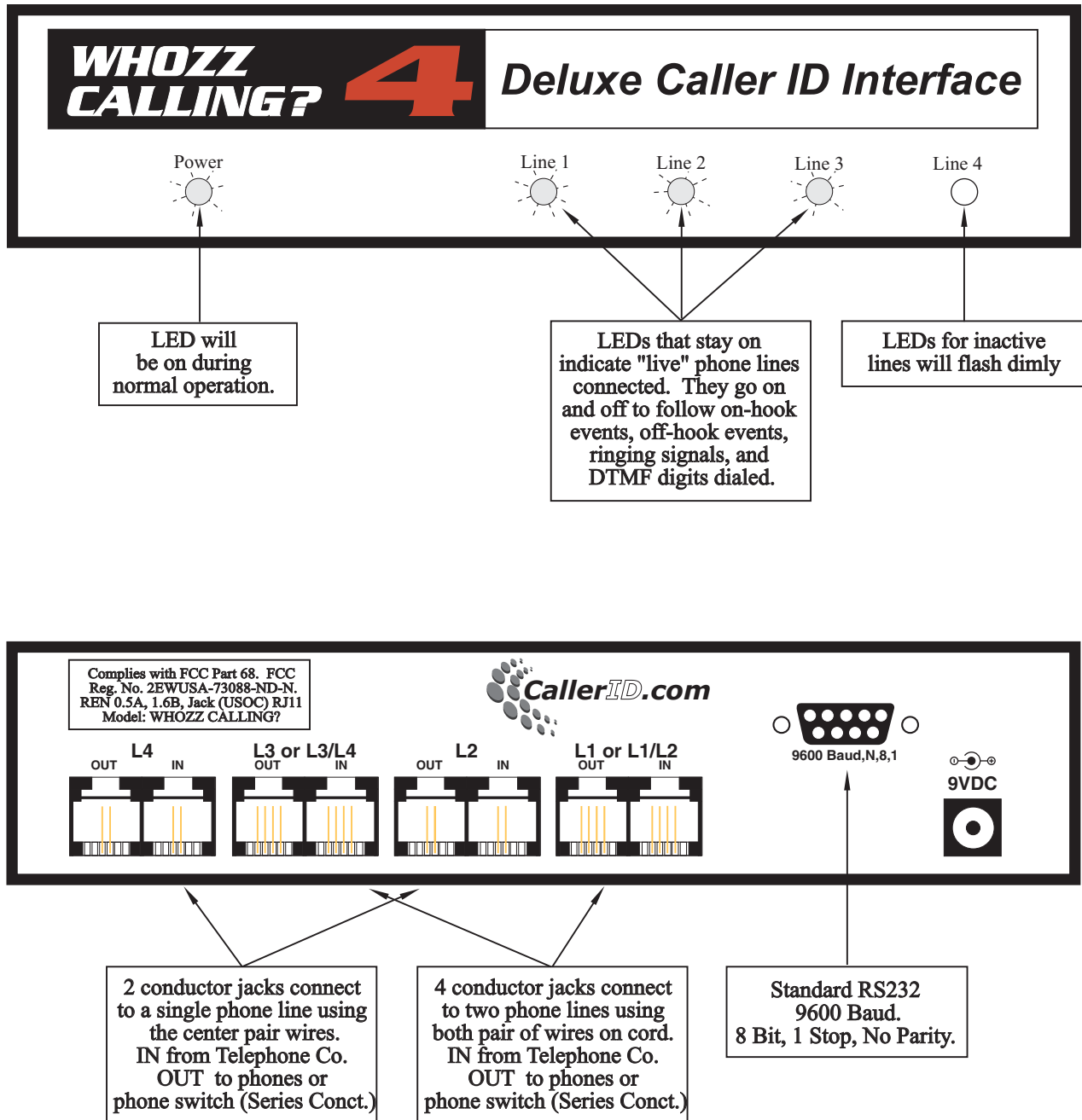
TELEPHONE LINE AND SERIAL COMMUNICATION REQUIREMENTS

The Whozz Calling? POS is designed to collect call data from standard analog central office telephone lines. It will not work properly when connected to extensions (or station) lines coming from a telephone switch. Connect the unit only to analog phone lines or phone lines that have been converted to analog signaling (i.e. Cable box converters, analog terminal adaptors, etc.).

If your unit connects to a computer through a serial port, the serial port must be functioning correctly and no other software application can be accessing this same port. This unit will work with any serial port or COM number setting that your software supports. If you do not have an available serial port on your computer, a USB-to-serial adaptor cable can be used. These can be found at any computer store or most office supply outlets. The USB-to-serial adaptor cable must be verified as, "correctly installed and operational" within the Windows device Manager

If your unit connects via Ethernet cable, plug it into any switch or router on your Local Area Network. Use the Ethernet Configuration Tool located at www.CallerID.com/downloads/diagnostic-tools/ to set the unit to a static IP address within your IP scheme and outside any DHCP range. Refer to the Ethernet Supplement for more details.

Fig. 1 Front / Back Views of Whozz Calling? 4 Deluxe (Serial Port Model)



Connecting to Phone Lines

There are two methods of connecting the monitoring unit to your phone lines: the series (pass through) connection, or the parallel (branch off) connection. The series connection uses both input and output modular jacks on the unit. The parallel connection uses only the input jacks.

Parallel Connection (recommended)

A parallel phone line connection is recommended and often easier since the incoming lines to the building can simply be "branched off" to the unit. This connection allows the unit to be removed from service for troubleshooting or repair without affecting the telephone call path. With this connection only the input ports on the unit are used.

Figures 2a & 2b (Pg. 26) show parallel connections. This involves branching off or "tapping" from each phone line to be monitored and connecting them to their respective input jacks on the unit. If appropriate, bare wire to modular adapters may be required.

Series Connection

Connecting the unit in series with the telephone lines is required only in special circumstances. Only if you need to operate the unit in a loop current detection mode (Appendix B, pg. 16), require first ring suppression, or are implementing call blocking would the unit need to be wired in series with the telephone lines. If the unit is connected in series and then taken out of service, the input and output phone lines will have to be connected together to resume normal telephone call flow.

Figures 3a & 3b (Pg. 27) show series connections. Each phone line to be monitored passes through the unit. Phone lines coming into the building connect to the input jacks on the unit (through bare wire to modular adapters, if needed). Lines connected to the output jacks continue to the desktop phones (through a phone switch, if present).

2-Wire (RJ11) or 4-Wire (RJ14) Phone Cord Connections

Most modular phone cords contain 4 wires which can handle two phone lines (2 wires for each line.) Your system may have either 2 of the wires connected (RJ11 - 1 phone line) or four wires connected (RJ14 - 2 phone lines). The modular connectors on the unit are equipped to handle either arrangement. They are marked similar to the modular connectors on a 2 line phone. For example, Channel 1 is marked "L1 or L1/L2". L1 is for a 2-wire phone cord and L1/L2 is for a 4-wire phone cord. Please refer to Fig. 1, pg. 2.

For a 2-wire (RJ11) system one phone cord simply plugs into each channel on the unit. Caution must be observed when connecting a 4-wire (RJ14) system. Phone cords must only be connected to channels 1 and 3. To prevent crossed telephone lines, do not connect phone cords to channels 2 and 4 on a 4-wire, RJ14 system.

If you are unsure whether your system is 2 wire or 4 wire a quick check can be made using the unit. First, power on the unit. Connect one cord to the input of channel 1. If only the Line 1 light comes on, you have a 2-wire (RJ11) cord. If both Line 1 and Line 2 lights come on, you have a 4-wire (RJ14) cord. Continue checking the rest of your cords in this manor.

Connecting to Computer (for Serial Port models only, else refer to the [Ethernet Supplement](#))

You may have purchased a software package designed to work in conjunction with the Whozz Calling? Deluxe unit. The software may have a built-in automatic search and find function. This routine will search all COM numbers in an attempt to determine settings for the serial port with which the unit is connected. If no communication can be established between your software and the Whozz Calling? unit, use our Serial Loop diagnostic tool to help solve the issue. For detailed instructions on working with the Serial Loop Tool refer to Appendix E, pg. 21.

OVERVIEW OF TOGGLES, COMMANDS, AND FORMATS

For simple Caller ID applications, we suggest the following default toggle setup:

ECXUDASOBKT

The combination of a lower case "A" and an upper case "S" instructs the unit to send call information at both the start and end of each call. With upper case "O" set, the unit will not report call information on outbound calls. This combination of toggles gives a simple configuration for Caller ID only applications. The toggles can be configured in either upper or lower case and combinations set to support various applications such as Popup screens, Call Accounting, Integrated Voice Response (IVR) applications and Telephony Diagnostics.

Application Notes: All toggles can be changed by simply sending the new toggle. The unit is designed to accept one toggle at a time. If a software application sends an initialization string of toggles to the unit, a short pause of at least 50 milliseconds should be inserted between each toggle so the unit it has enough time to write the entry to non-volatile memory.

Setup Toggles

This is a quick listing of the setup toggles. A complete explanation of each toggle begins on page 6.

E Always E

C \$ sign not sent as leading character in data stream & dashes inserted in phone number.

c \$ sign is sent as leading character in data stream & dashes removed in phone number.

X Always X

U Internal blocking/passing OFF. *Only available on select units.

u Internal blocking/passing ON. (Block or pass is determined by "**K,k**" toggle).

K Pass calls until notified by Internal Memory routine ("**u**") or by **W** command.

k Block calls until notified by Internal Memory routine ("**u**") or by **W** command.

A Data sent BEFORE and AFTER call.

a Data sent as defined by "**S,s**" toggle.

S Data sent at the Start of call only. (If "**a**" set above).

s Data sent at the End of call only. (If "**a**" set above).

B Block first ring to output jack. *Only available on select units.

b Block first ring set to OFF.

D Detail information for call not sent.

d Detail information sent.

O Inbound call information sent only.

o Outbound and Inbound information sent.

T Always T

Operating Commands

- @ Send back # sign. (Used for establishing device communication).
- V Send firmware Version number, date & time, toggle settings, line numbers.
- v Send internal jumper settings (determining the Caller ID type captured and On/Off-Hook scheme used)
- J List all phone numbers in memory. (Used for internal blocking/passing).
- Q Delete all phone numbers in memory.
- R Reset system. Toggles set to upper case default values.

Data Entry Commands

- N00000770n<CR>** Set starting line number count. When **n=1** unit reports data as line 1 through line 4 on a four line unit. If **n=5**, unit reports L5-L8 on a four line unit.
- Nnnnnnnnnn <CR>** Add phone number to memory for internal block/pass feature.
**Only available on select units.*
- Wnn <CR>** Normal use (toggle "**K**" set) is to block call on line **nn**. Usually sent after the CID string and before the 2nd ring. Or, pass call on line **nn**. ("**k**" set).
**Only available on select units.*
- Zmmddhhmm <CR>** Set date and time on internal device clock.

Detail Mode Output

- | | | |
|-------------|------------------------|----------------------------|
| nn R | Date & Time | Ring on line nn |
| nn F | Date & Time | Off Hook on line nn |
| nn N | Date & Time | On Hook on line nn |

Additional Detail Information

- | | | |
|---------------|------------------------|--|
| nn Vxx | Date & Time | Firmware version of slave ROM (Displays on start up) |
|---------------|------------------------|--|

Error Condition

- ? Error (invalid command or could not interpret data)

Output Format

01 I S 0276 G B3 09/26 11:28 AM 800-240-4637 CallerID.com<CR/LF>

01	Line number field	2 char.	(preset by user)
I	Inbound/Outbound field	1 char.	(or O for outbound)
S	Start/End of call field	1 char.	(or E for end)
0276	Duration of call in seconds	4 char.	(only sent at end of call)
G	Good checksum for CID string	1 char.	(or B for bad checksum)
B3	Number & Type*of Ring(s)	2 char.	(only sent on end of call)
09/26	Date field	5 char.	
11:28	Time field	5 char.	(12 hour format)
AM	AM/PM field	2 char.	
Phone #	Phone number field	14 char.	(in some cases only 7 digits sent)
Name	Name field	15 char.	(sent only in some areas)

Note: Each data string is followed by a carriage return and a line feed.
1 space separates each field

* Type of Ring is valid only if distinctive ring service is ordered from telephone company.

IN-DEPTH DISCUSSION OF TOGGLES, COMMANDS, AND FORMATS

Setup Toggle Discussion

E Always E

C,c Leading \$ character and dashes removed in phone number field

Some applications need to detect a certain character in order to perform an operation. When this toggle is set to "c", the unit places a "\$" character before each data string. This includes detail data strings such as Ring, Off hook, On hook, and Hook flash (see toggle "D,d"). Also when c is set, the dashes are removed from the telephone number field. The telephone number justification remains as set by the "X,x" toggle.

X Always X

U,u Internal Block/Pass *Only available on select units.

The unit can block or pass incoming calls based on a match phone numbers pre-loaded into the on-board memory. The "u" toggle turns on the Block/Pass feature. The "K,k" toggle determines whether the unit blocks or passes calls that match these numbers.

K,k Block or Pass Select *Only available on select units.

Set "K" to pass all calls until defeated. Set "k" to block all calls until defeated. These toggles can be defeated by either the "W" command sent by the host computer or signal sent by the internal memory when a phone number match is found.

A,a Data Delivery Option (Start & End or Start/End)

The unit is capable of delivering a data stream to the host computer immediately as the call arrives, when the call terminates, or both. For an inbound call, immediate data delivery allows the Caller ID information to be utilized before the call is answered for purposes of database queries, call routing, etc. Delivering the data stream after the call ends provides additional information about the call to the application program such as, the duration of the call and the number of rings before the call was answered. If lower case "a" is set, data is sent as defined by the "S,s" toggle.

S,s Data Delivery Option (Start/End)

For this toggle to affect operation "a" must be set. If call data is to be sent before the call is answered, set toggle to "S". If call data is to be sent only after call terminates, set toggle to "s". If call data is to be sent before and after the call, set toggle "A".

B,b First Ring Suppression **Only available on select units.*

When this toggle is set to "B", the first ring to the output jack on each line is suppressed. Since the Caller ID stream is sent between the first and second rings on the telephone line, this prevents the call from being answered before the information is sent. However, in some cases, hearing the first ring might be essential for the user to respond to the call in a timely manner. If this is true, set this toggle to "b".

D,d Detail Information

Some software applications may need additional call data. When the lower case "d" toggle is selected, the unit can provide an indication for Ring, Off hook, On hook, and Hook flash. The format is as follows: line number (**nn**); space; and either a **R** (**R**ing), **F** (**oF** hook), **N** (**oN** hook), or **H** (**H**ook flash). The date and time (HH:MM:SS) follow at the same offset as the date/time field in the comprehensive format. In the detail mode, the time is delivered in a 24 hour format. (Please note: If the "c" toggle is selected, a leading "\$" will be added to the above data string). For more information see the section on Detail Mode on page 9.

O,o Inbound/Outbound Select

For basic Caller ID applications, use the upper case "O". If complete call accounting is required, use lower case "o". The lower case "o" instructs the unit to deliver for both inbound and outbound calls.

T Always T

Operating Commands Discussion

@ Handshaking character when sent

The unit will return "#" when "@" is sent. This can be used to establish communication between the computer and the unit. One application for this command is a software setup routine that automatically searches for the unit by sending an "@" character on each **COM** port and **IRQ** until a "#" is returned. The corresponding **COM** port and **IRQ** number then can be set automatically in the application.

V Firmware version and all settings

This command returns the firmware version, all toggle and line number settings, and date & time (in military format) on the internal time clock. On start-up, toggles will be defaulted to all upper case values; the line number will be set to "**L=01**"; and date & time will be set to zero. All toggles and line number settings are stored in non-volatile memory and will remain saved even if the unit loses power. The internal clock does not run while the unit is off, and therefore, it must be reset when power is restored. The clock can be reset by the software using the "**Z**" command or will be reset on the first good Caller ID signal. Subsequent Caller ID signals with good checksums will continue to reset the internal time clock with the telephone company's time.

v Firmware version and all settings

This command returns the configuration of the internal jumper settings. Jumpers on the circuit board configure the unit to capture either of the 4 types of Caller ID signaling formats used around the world (refer to Appendix A, page 14) as well as the On/Off scheme used by the device. In most cases, the Caller ID signaling format is factory set to FSK (US type). If the Caller ID signaling type is pre-determined for your area before being shipped, these jumpers may be set to the pre-determined format. The On/Off-Hook scheme is also set using internal jumpers to either Voltage or Current Detection (Appendix B, page 16). Below are examples of lower case "v" outputs.

- v-VFU** (Voltage Detection, FSK, US Type)
- v-CFB** (Current Detection, FSK, BT/ETSI Type)

J List all phone numbers in memory

This command lists all telephone numbers stored in non-volatile memory. These numbers can be used to either block or pass calls to the output phone jacks. (Refer to the section on use of toggles "U,u" and "K,k"). The non-volatile memory can store up to fifty, 10 digit or 7 digit phone numbers. Phone numbers are entered using the "Nnnnnnnnnn" command discussed in Data Entry Command section, see section below.

Q Delete all phone numbers in memory

This command deletes all telephone numbers stored in non-volatile memory.

R Reset System

This command resets the operating system and resets all toggles to upper case values. It does not reset the line number or the baud rate. The time clock can be reset by using the "Zmmddhhmm" command (see details below), or by capturing a good Caller ID signal.

Data Entry Commands Discussion

N00000770n<CR> Set starting line number count of unit.

When multiple units are used on the same system, units can be set to report the matching phone line numbers they represent. For example, when 2 four line units are connected to monitor 8 total lines. The second unit needs to be set to report lines 5,6,7, and 8. Connect to the second unit and send **N000007705<CR>**. The last digit, 5 tells the first line to report data as line 05. Consequently, the second channel will report as line 6, the third as line 7, and so on. If you set an eight line unit to line 5, it would report data on lines 5-12.

Nnnnnnnnnn <CR> Add phone number to memory **Only available on select units.*

This command allows telephone numbers to be entered into non-volatile memory. These numbers can be used to either block or pass calls to the output phone jacks. See section on use of toggles "U,u" and "K,k". The on-board memory can store as many as thirty, phone numbers. Phone numbers entered into memory must be between 7 and 12 digits in length. Any attempt to enter a number less than 7 or more than 12 digits long will cause the unit to send back a question mark and the number will not be accepted by the memory. Ten digit numbers are common for the US and Canada. Less than and more than 10 digit numbers are common in other countries.

If you want to add "Private" and "Out-of-Area" and callers to the memory list, refer to the following:

- For **Private** Callers, enter: **N77<CR>**
- For **Out-of Area** Callers, enter: **N66<CR>**

Wnn <CR> Block (or pass) call on line **nn** *Only available on select units.

This command should be sent after the Caller ID signal and before the second ring. This way the call can be blocked (or passed) based on the Caller ID information. If toggle "**B**" is set, the first ring will be blocked. The application program determines whether the remaining rings should be blocked or passed. Please note: Normally, toggle "**K**" is set. This allows all calls to pass until a "**W**" is sent by the application (or an internal command is sent by the hardware memory). In a secure phone line application, the toggle "**k**" might be set in order to block all calls until the "**W**" command is sent (or the internal command is sent by the hardware memory).

Zmddhhmm <CR> Set date and time on internal clock

This allows the programmer to set the internal clock on the unit. Since there is no battery backup on board, once power is removed from the unit, the internal clock resets to "00/00 00:00:00". This command may never have to be used, due to the following: On the first incoming call with Caller ID and a good checksum, the internal time clock will be set to the time sent in the Caller ID signal. On every call thereafter, the internal clock is reset to the Caller ID time. The format for time entry using the "**Z**" command is **mm** (month), **dd** (day), **hh** (hour), and **mm** (minute).

Detail Mode Output Discussion

If the toggle "**d**" is set, all detail information on each call is sent immediately. The detail events include Ring, On Hook, Off Hook, and Hook Flash. Each event reported by the unit starts with the line number, followed by the abbreviation of the event, and finally, the date and time. The date and time is offset 13 characters to the right so that it will appear in the same offset position as the date and time in the comprehensive format. Also, the time is displayed in a military format so that the time of the event can be determined exactly. An example is shown below.

01 R	11/07 07:43:52	Ring on line 1 at 7:43 AM
01 F	11/07 17:45:04	Off Hook on line 1 at 5:45 PM
04 N	11/07 10:46:23	On Hook on line 4 at 10:46 AM

Error Condition Discussion

A question mark (?) is returned on most any input that is not valid. Also, any non-interpretable characters contained within a Caller ID string will be sent as a question mark. Most likely the checksum will be calculated as "bad".

Format Discussion

Inbound Calls

The format for an inbound call is shown in Fig. 2a. The data string can be, 63 characters in length, including the leading \$ sign (if the "**c**" toggle is set), spaces, the carriage return, and line feed characters at the end of the data. The line number always precedes the data string. In this example, data from line 3 is discussed.

The Inbound/Outbound and Start/End of Call Indicators use I/O and S/E respectively. Remember that the unit can be set to send data on inbound and outbound calls or only on inbound calls (toggle "**O,o**"). Also, the data stream can be sent at the start of the call, end of the call, or both (see toggles "**A,a**" and "**S,s**").

Since the duration of the call is sent only after the call is complete, toggles "**O,o**" and "**S,s**" must be set so the unit will send data at the end of the call.

The Caller ID string sent by the telephone company always contains a checksum. The unit compares its checksum with the checksum sent by the phone company and displays the either "**G**" (Good) if the two match or "**B**" (Bad) if they do not match. The application programmer may elect to ignore this indicator and determine the validity of the data after reading in the data stream.

The next field contains both the number of rings delivered by the telephone company before the call was answered and the type of ring. A service called Distinctive Ring or Ring Master is offered to customers in many areas. It allows up to 4 telephone numbers to be routed to one phone line. Each phone number dialed causes the telephone to

ring differently. The unit will determine which ring pattern is delivered and mark it as A,B,C, or D. Please note the number of rings is always zero except when the data is delivered at the end of an incoming call.

The date and time information is sent by the phone company as part of the Caller ID signal on each incoming call. For each incoming call with a good checksum, the time and date information will be used to reset the internal real time clock to match the telephone company's clock.

The phone number field for the comprehensive format is 12 characters and left justified. Dashes are inserted when the "C" toggle is set. If the "c" toggle is set the dashes are removed (and a leading \$ sign is inserted in front of the data string). In some areas of the US and Canada, no area code is sent for calls within the local calling area. In this case, the unit will send the 7 digit phone number, left justified. If the application software will be used in different areas of the country, it is suggested that the local area code reside in the software to be appended to any 7 digit number delivery to make it a 10 digit number.

In many areas, the name of the caller will be delivered along with the number. This service is sometimes referred to as Caller ID Plus, Caller ID Deluxe, or Enhanced Caller ID. If delivered by the local telephone company, the name will reside in a left justified, 15 character field, following the number field. Names for private residences are usually sent last name first, space, first name, space, and then middle initial. Business names are most often sent as they are listed, but if they over 15 characters, truncation will occur. Caller ID specifications allow for the delivery any characters or symbols.

Outbound Calls

Figure 2b shows the format for outbound calls. Unlike Fig. 2a, toggle "c" is set. (Remember toggle "c" places a \$ sign before the data stream and removes dashes in the phone number field.)

The outbound indicator displays **O** and the Start/End indicators are the same as inbound calls. The duration of the call is only sent at the end of the call and is displayed in seconds. The checksum indicator is always "good" and the number of rings remains "zero" at all times. The date/time displayed is the date/time that the call was initiated and does not change at the end of the call. The unit tries to be as "smart" as possible in determining where to place outbound dialed digits. Digits dialed are placed in either the number or name field. The algorithm below explains where the unit places digits.

All digits dialed within 2 seconds of each other will be displayed beginning in the number field. If more than 10 digits are dialed, the additional digits will be displayed in the name field. The "Start" data string for outbound calls will be sent immediately after a period of 2 seconds when no digits are dialed. Any digits dialed after this 2 second interval will be displayed in the name field and will be displayed only at the end of the call. In the example in Fig. 2a, second data string, the 800 number was originally dialed. After a few rings, an automated answering device answered the call. The caller then dialed additional digits responding to voice menu selections.

An exception to this 2 second rule provides for 7 and 10 digit numbers to be reported in the number field on the end record, regardless of the interval between dialed digits.

Data Output Format

Figure 2a

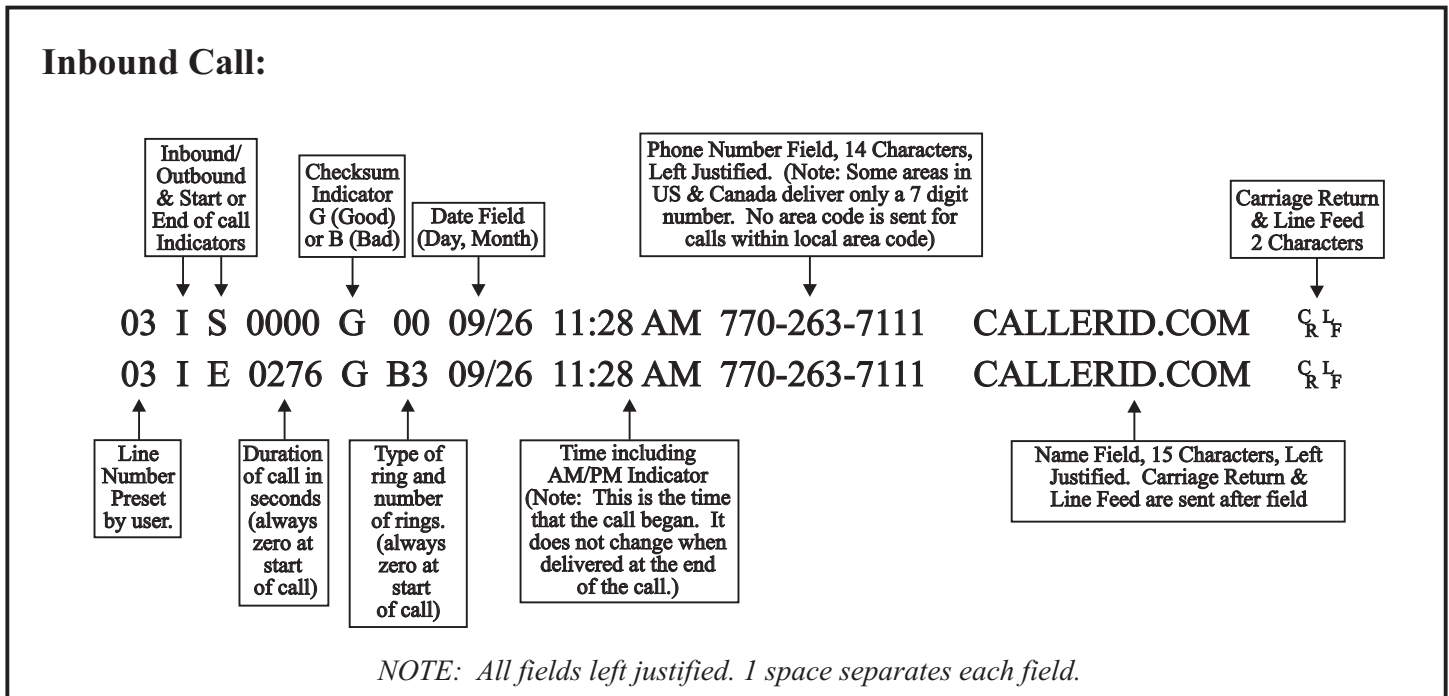
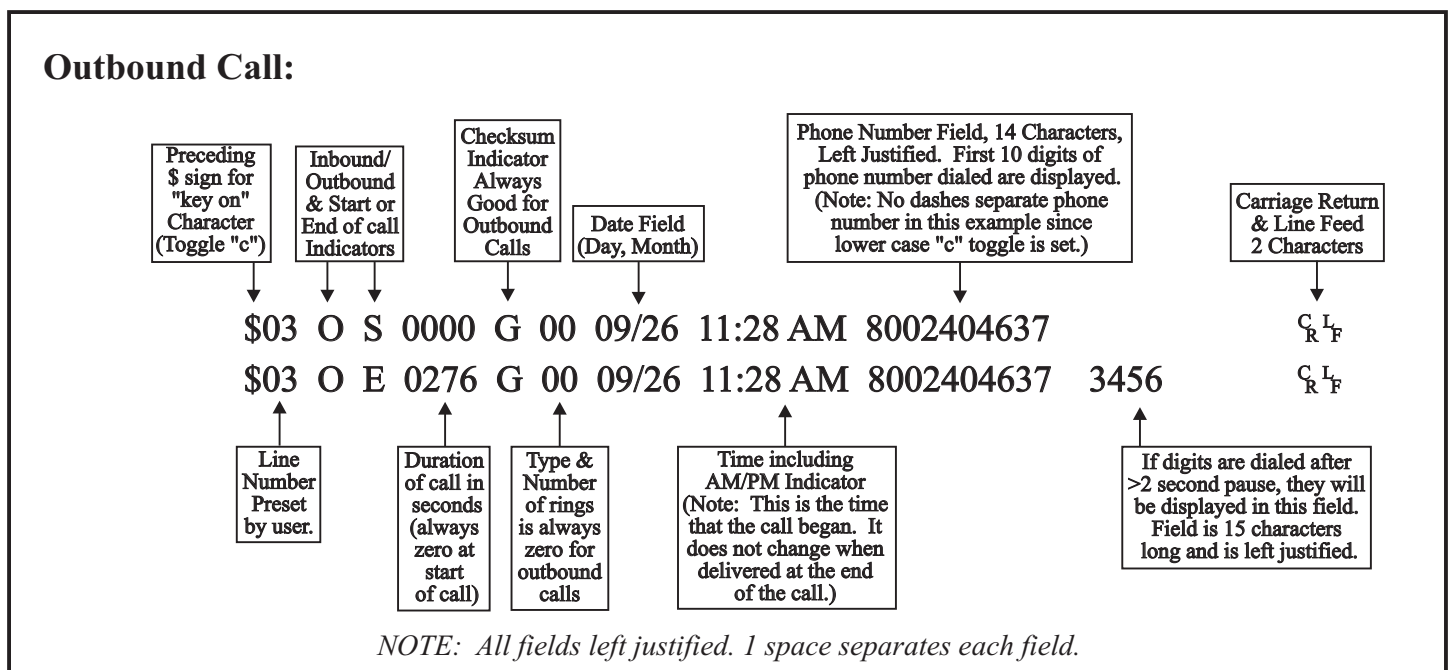


Figure 2b



DISCUSSION OF PRIVATE AND OUT-OF-AREA CALLERS

Two unique messages can be delivered as designated by Caller ID specifications. An "Out-of-Area" message occurs if the information on a caller is unavailable. This is true for most cellular calls and is sometimes the case when the call originates outside the telephone company's Local Access Transmission Area (LATA). This loosely translates to long distance calls.

A "Private" message is sent for callers who have blocked their Caller ID number from being transmitted to the called party. Blocking can occur either on a per call or on a per line basis. For per call Caller ID blocking, a code (*67) can be dialed before each call is made. In some areas, customers can request that all calls from their line be permanently blocked. In either case, the recipient of calls from these numbers will receive a "Private" or "Anonymous" indication from their Caller ID device.

Private and Out-of-Area messages can occur in either the number or name fields if number and name service is being delivered. For example, some telephone companies allow customers to have private numbers, but names are sent. In another case, the number might be sent, but the name of the customer is Out-of-Area. This would most likely happen if the customer had just received new service and the telephone company's database had not been recently updated. It is best that your application software handles any combination of number, name, private, and out-of-area messages in both the number and name fields.

SPECIFICATIONS

Supply Voltage:	9 VDC, center negative
Supply Current:	Less than 250 mA
Loop Current Draw:	Less than 1 mA
Loop Voltage:	30 to 105 VDC
Ringing Voltage:	60 to 130 VAC
Insertion Loss:	Less than 0.3 dB
Voltage Drop:	2.7 VDC at 20 mA loop current
Dimensions:	8.0" W x 2.0" H x 6.25" D
Ringer Equivalence:	(REN) 0.1 B

MANUFACTURE’S INFORMATION

CallerID.com
5680 Oakbrook Parkway, Suite 150
Norcross, GA 30093

Sales (800) 240-4637
Customer Service (770) 263-7111
Web Site www.callerid.com

WARRANTY INFORMATION

CallerID.com will repair this product with new or rebuilt parts, free of charge, when returned postage prepaid to the CallerID.com repair facility in Norcross, GA within 1 year from the date of original purchase.

This warranty is extended only to the original purchaser. A purchase receipt or other acceptable proof of purchase date will be required before warranty service is rendered.

This warranty covers failures due only to defects in materials or workmanship occurring during normal use. It does not cover damage which occurs in shipment; failures which are caused by products not manufactured by CallerID.com; failures which result from accident, misuse, abuse, neglect, mishandling, misapplication, alteration, modification or unintended use of product; service by anyone other than an authorized CallerID.com repair facility; or damage attributed to an act of God. Lightning is considered an act of God.

CallerID.com makes no other warranty, either expressed or implied, with respect to this product.

If a problem develops concerning this product, contact your local dealer or CallerID.com directly for a Return Material Authorization (RMA) number. A RMA number is required for all returns.

Appendix A - International Caller ID formats and Internal Jumper Settings

Caller ID is a data signal generated by the phone company's central office (CO). The type of Caller ID signal that will be sent by a phone company will depend on the type of equipment in use at their CO.

Caller ID signaling formats vary throughout the world. At present, there is four basic formats with local variations of each format type. By setting the proper combination of internal jumpers (shunts), the Whozz Calling? unit can capture any of these four basic Caller ID signaling formats. The four basis formats are:

1. Bellcore 202 - USA Type. Sent in many countries. FSK sent between the 1st and 2nd ring cycle.
2. British Telecom – Only sent in United Kingdom. FSK sent before the 1st ring cycle.
3. ETSI - Sent primarily in Western Europe. FSK sent after very short 1st ring.
4. DTMF - Sent in regions that use older CO equipment. DTMF (touch-tones) sent before the 1st ring.

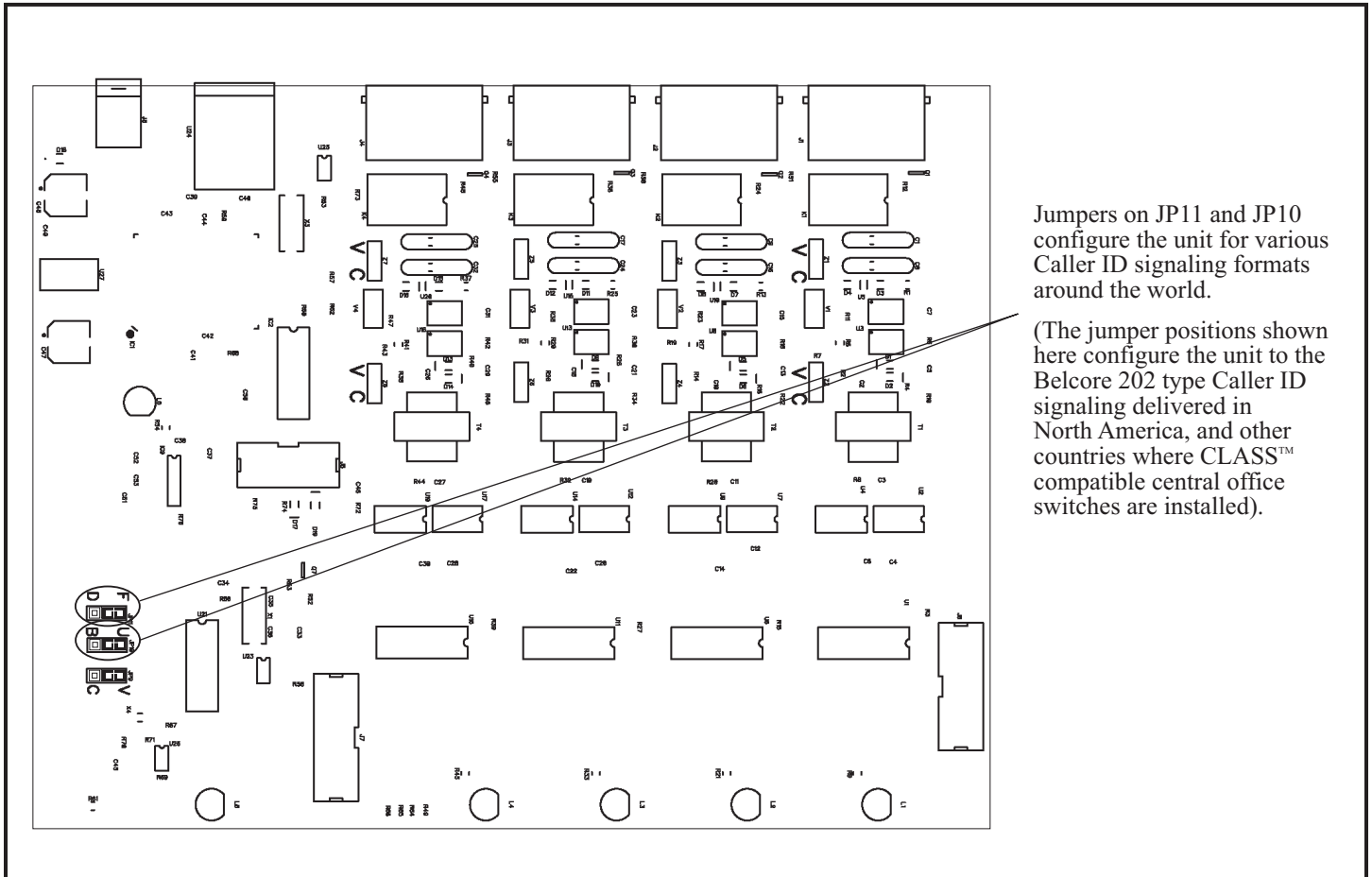
NOTE: Refer to the table in Fig. A1 for more information on known formats in particular countries.

The standard factory setting for Whozz Calling? Deluxe units is to capture Bellcore 202 type Caller ID. If the signaling format was determined in advance of the unit being shipped, the unit may be set for an alternate format.

In order to configure the unit to a different Caller ID signaling format, the top of the enclosure must be removed and shorting jumpers moved on the circuit board. Use the following steps and refer to Fig. A1 on the next page.

1. Remove power to the unit.
2. Remove the top of the enclosure by first removing the two Phillips head screws on the bottom of the unit.
3. Slide the top of the enclosure off.
4. Locate the shorting jumpers on the circuit board used for Caller ID signaling formats using Fig. A1.
5. Slide off the appropriate jumper(s) and reconnect as per the table below the diagram.
6. Replace the top of the enclosure and replace the two screws.

Fig. A1 - Configuring Unit for Different Caller ID Signaling Formats



Configuration Table for Caller ID Signaling Formats

Jumper Positions	Caller ID Signaling	Characteristics	Countries/Regions Known
JP11 JP10 F <input type="checkbox"/> <input type="checkbox"/> U D <input type="checkbox"/> <input type="checkbox"/> B	Belcore 202	FSK signal between the 1st and 2nd ring. Time & date sent, Caller ID name optional.	USA, Canada, most of Mexico, most of the Caribbean, Panama, Argentina, Australia, New Zealand, Hong Kong, Singapore, China, Israel, Malta and other areas using CLASS compatible central office switches
JP11 JP10 F <input type="checkbox"/> <input type="checkbox"/> U D <input type="checkbox"/> <input type="checkbox"/> B	British Telecom and ETSI	FSK signal before 1st ring or after very short 1st ring. Time & date sent, Caller ID name optional.	United Kingdom, U.A.E., France, Germany, Spain, Italy, Norway, South Africa, Turkey, Japan and any other countries that adopted the ETSI standard.
JP11 JP10 F <input type="checkbox"/> <input type="checkbox"/> U D <input type="checkbox"/> <input type="checkbox"/> B	DTMF (touch-tone)	DTMF tones sent before 1st ring. No time & date, no Caller ID name, only Caller ID number sent.	Brazil, Uruguay, Guatemala, and many other Central and South American countries. Denmark, Holland, Iceland, Sweden, India, Saudi Arabia, Kuwait, and other Middle Eastern countries.

Appendix B - On and Off-Hook Detection (Voltage vs. Current)

The Whozz Calling? Deluxe detects when the phone is on-hook and off-hook. This allows the unit to determine the length of each phone call and report this detailed information to the software. Telephone monitoring equipment can detect the occurrence of the On Hook and Off Hook status of the phone line by two methods. It can either sense the voltage on the phone line itself or sense current flow on a phone line passed through the equipment.

Voltages on incoming central office (CO) phone lines are consistent among all branches throughout a physical location (building). If the voltage levels are in standard range, a Deluxe unit functioning in a voltage detection mode is able to sense On and Off Hook on any branch in the building. The obvious advantage to this detection scheme is that the monitoring equipment can be connected in parallel to the CO lines. Your unit comes from the factory set to voltage detection mode because, in most locations, this detection scheme works properly.

Current on phone lines only flows to the telephone device that is Off Hook. Monitoring equipment that senses On and Off Hook by means of current flow must be connected between the phone company's incoming line and the device(s) that goes Off Hook. The current will flow through the monitoring equipment to the Off Hook device. With this detection scheme, any telephone device that makes or receives phone calls must be attached in series (i.e to the output jacks) "behind" the monitoring equipment.

VOLTAGE DETECTION CIRCUITRY AND TELEPHONE LINES

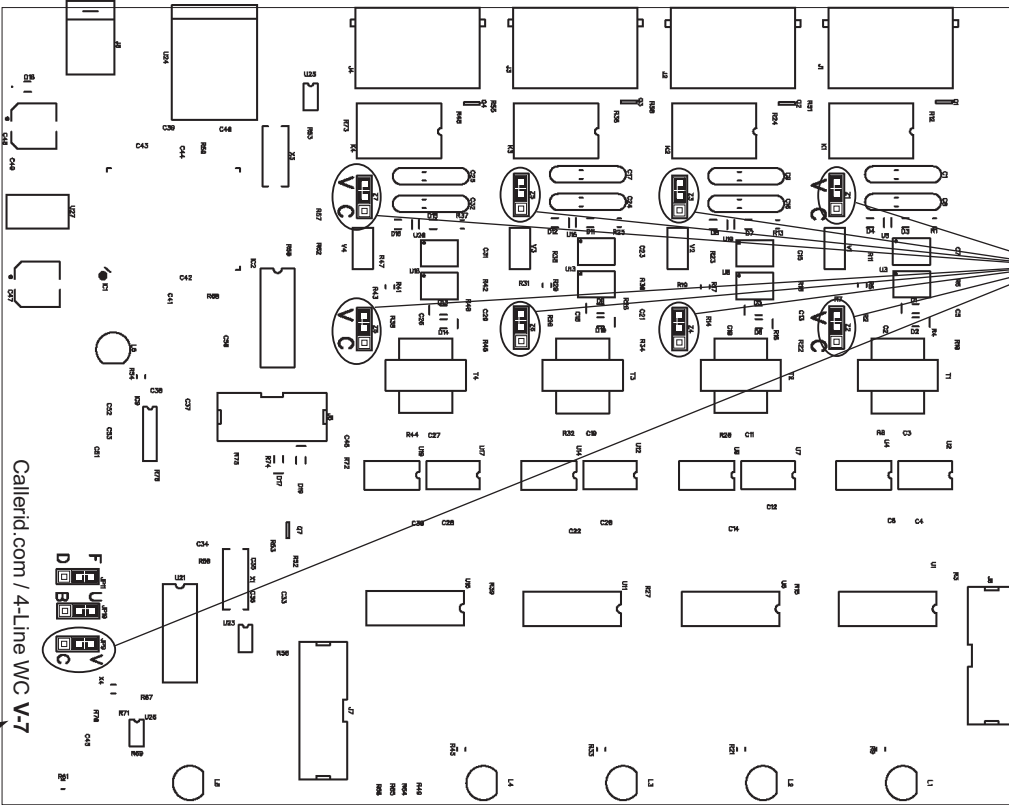
In order to sense the voltage on the phone line, the unit's circuitry must draw a small amount of current from the phone line. The current draw is very small (70 μ A, similar to a voltmeter), and is drawn when the phone line is On Hook. The telephone company's amplifier supplying the power to your location may not be able to supply this current and still keep the On Hook voltage level within the standard range. This occurs primarily in older residential and commercial locations. An unsophisticated telephone company repair technician may diagnose this small current draw by the unit as a "short" on the line. Therefore, the telephone company will not address the shortcoming of their supply amplifier. If this situation occurs, the unit cannot be used in the voltage detection mode, it must be reconfigured to the current detection mode.

RECONFIGURING UNIT TO CURRENT DETECTION MODE

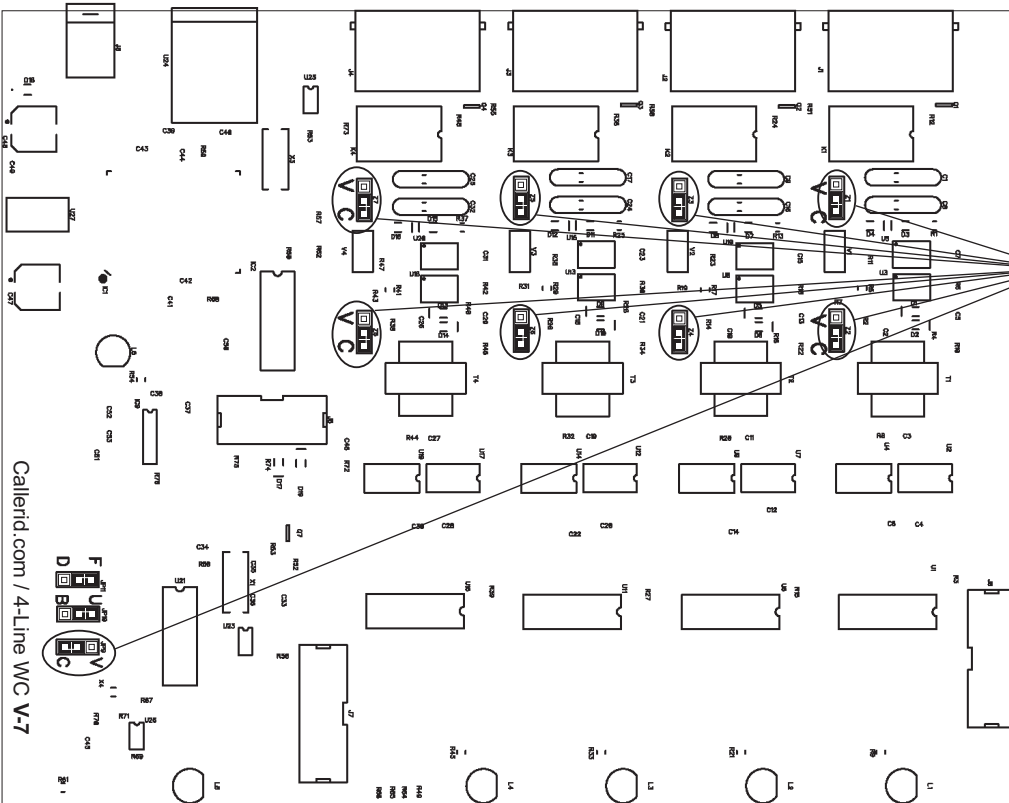
In order to configure the unit to a different Caller ID signaling format, the top of the enclosure must be removed and shorting jumpers moved on the circuit board. Use the following steps and refer to Fig. B1 or Fig. B2 following.

1. Remove power to the unit.
2. Remove the top of the enclosure by first removing the two Phillips head screws on the bottom of the unit.
3. Slide the top of the enclosure off.
4. Locate the shorting jumpers on the circuit board (2 per channel and 1 main jumper) used for configuring the unit to Current Detection using Fig. B1
5. Slide off the appropriate jumper(s) and reconnect as per lower diagrams based on the Version number of the Printed Circuit Board (PCB).
 - Use **Diagram B1** for PCB Version 6,7,or8.
 - Use **Diagram B2** for PCB Version 10 and above.
6. Replace the top of the enclosure and replace the two screws.

Fig. B1 - Voltage and Current Detection Configuration (4 Line Model -PCB Version 6,7,or 8)

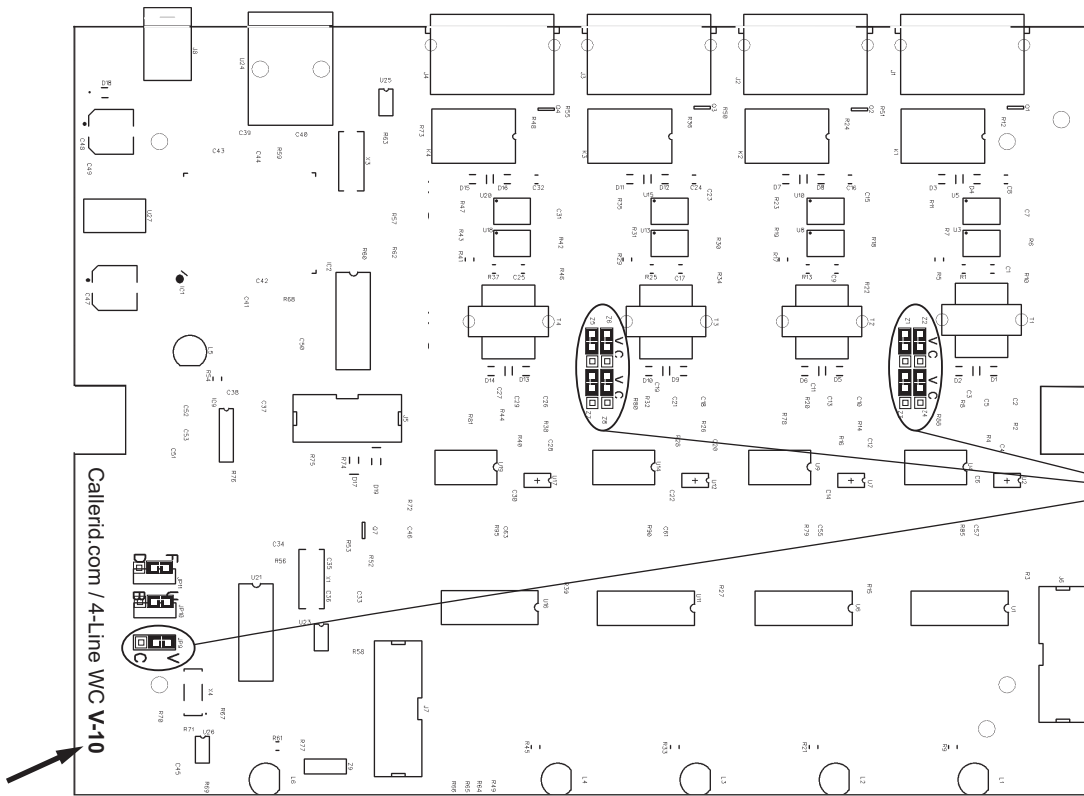


Voltage Detection - 8 Channel Shunts to the Rear of Unit, Main shunt to Right



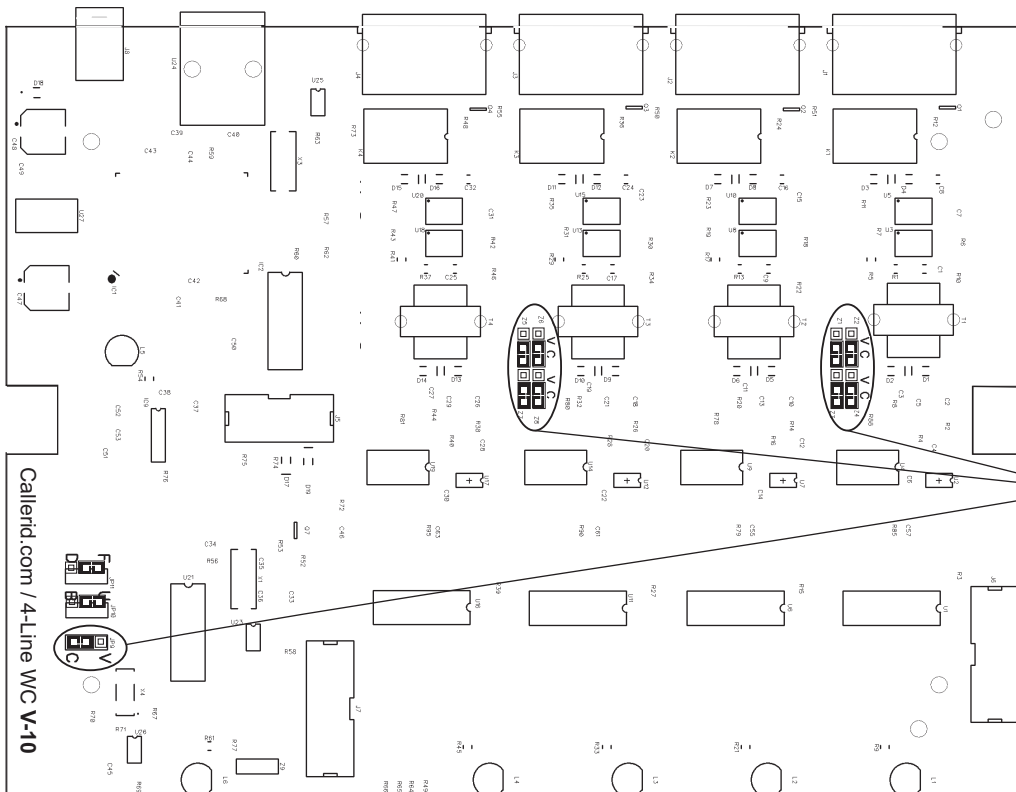
Current Detection 8 Channel Shunts to the Front of Unit, Main shunt to Left

Fig. B2 - Voltage and Current Detection Configuration (4 Line Model -PCB Version 10 or above)



Unit is configured for Voltage Detection when all 9 shunts are connected as shown.

Voltage Detection - 8 Channel Shunts to the Rear of Unit, Main shunt to Right



Unit is configured for Current Detection when all 9 shunts are connected as shown.

Current Detection - 8 Channel Shunts to the Front of Unit, Main shunt to Left

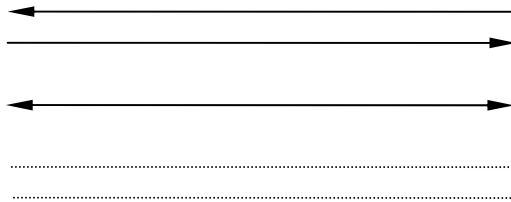
Appendix C - RS232 Pin Outs

9 PIN CONNECTIONS

When the serial port is configured to “No Flow Control,” only **Transmit**, **Receive**, and **Ground** connections are required. Pin 7 and Pin 8 need to be connected only if other serial flow control types are selected.

Computer DB9/M Serial Port

Pin 1 (Carrier Detect)
 Pin 2 (Receive)
 Pin 3 (Transmit)
 Pin 4 (Data Term. Ready)
 Pin 5 (Ground)
 Pin 6 (Data Set Ready)
 Pin 7 (Request to Send)
 Pin 8 (Clear to Send)
 Pin 9 (Ring Indicator)



Monitoring Unit DB9/F

Pin 1 (No Connection)
 Pin 2 (Transmit)
 Pin 3 (Receive)
 Pin 4 (No Connection)
 Pin 5 (Ground)
 Pin 6 (Control Line between Units)
 Pin 7 (Internal Connection)
 Pin 8 (Internal Connection)
 Pin 9 (No Connection)

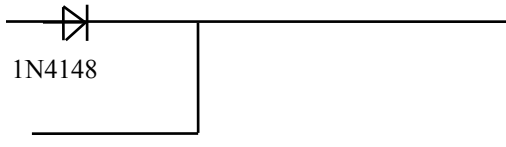
APPLICATION NOTES

Pin 6 is connected only between multiple Whozz Calling? units and acts as a control line. When units are not transmitting data this line resides at -9 VDC. Upon transmit, the unit pulls this line to +9 VDC. Other Whozz Calling? units connected will detect this as a busy condition and will not transmit until the line returns to -9 VDC.

If your application program is designed to perform software controlled real time call blocking/passing through a serial connection, it is important that the Pin 6 control line is at the very least, monitored for the busy condition. Since units cannot transmit and receive data at the same time, any commands that are issued by the software must be sent while units are not transmitting. The best solution is to monitor the control line on Pin 4 and pull it high with Pin 6 when your software is transmitting. This method will assure that commands sent to units will get through. This line should be pulled high by your serial port through a standard 1N4148 diode as diagrammed below.

Computer 9 Pin Serial Port

Pin 6 (Data Set Ready)
 Pin 4 (Data Terminal Ready)



CallerID.com Female DB9

Pin 6 (Control Line)

Appendix D – Phone Line Compatibility

COMPUTER REQUIREMENTS

Serial port units must be connected to a dedicated serial port on your computer that other applications are not accessing. The particular serial port COM number combination it is connected to must be set in your application software you are running in conjunction with the unit. The requirements for computer CPU speed, disk drive space, memory, and operating system are determined by the software application you are running.

PHONE LINE COMPATIBILITY

The unit should be connected to the telephone lines coming into your building commonly know as the Central Office or “CO” lines. These lines are otherwise referred to as flat rate, local loop, or 1FB lines. The unit can also operate on analog Centrex™ lines. In order to operate the unit on trunk lines (otherwise know as “ground start” lines) you will have to contact CallerID.com to swap your unit for a current detection model. The unit will not work connected directly to digital Centrex™, T1, or ISDN lines. If you have an ISDN interface hardware that has analog telephone outputs, outbound monitoring is possible but only with a current detection unit. Also, with a current detection unit you can monitor outbound calls if the unit is placed on analog extensions from a telephone switch. See Table 1 for telephone line type compatibility.

Table 1 - Phone Line Compatibility

Depending on the type of phone line, the unit may be compatible with Caller ID and outbound call monitoring, or just outbound call monitoring only. The unit senses On/Off Hook by detecting the telephone line voltage levels. If the voltage levels are not in standard local loop ranges, the unit can be replaced with a current detection model by CallerID.com to detect On/Off Hook by means of current flow through the device

	Caller ID Capture	Outbound Calls	On/Off Hook Detect
Standard Local Loop (1FB)	Yes	Yes	Voltage or Current
Analog Centrex	Yes	Yes	Voltage or Current
Ground Start (Trunk)	Yes	Yes	Current Only
ISDN Interface w/ Analog Ports	Yes, if interface generates <u>analog</u> Caller ID	Yes, through analog ports only	Current Only
Switch Analog Extensions	No	Yes	Current Only
Switch Digital Extensions	Not Compatible	Not Compatible	Not Compatible
ISDN, T1*, Digital Centrex	Not Compatible*	Not Compatible*	Not Compatible*

*** Note: T1 circuits terminated with External routers capable of separating and combining Voice and Data are, in fact, compatible with Whozz Calling? units. These routers supply standard analog 1FB lines to the phone system.**

In order to capture Caller ID, an analog Caller ID signal must be present on the phone line. This signal can be sent directly from the phone company or certain types of ISDN interface units can regenerate digital Caller ID data as analog Caller ID signals to its analog ports. Analog Caller ID will not pass through telephone switches to extension lines. Even Caller ID compatible telephone switches do not pass or regenerate analog Caller ID signals to extensions lines. Units will not operate if directly connected to digital phone lines.

Appendix E - Serial Loop Diagnostic Tool

(For Serial Port models only, else refer to Ethernet Supplement)

The Serial Loop diagnostic tool helps you determine and resolve connection issues between the Whozz Calling? Deluxe unit and your computer's serial port. You may have purchased a software package designed to work in conjunction with the Whozz Calling? Deluxe unit. If so, close this application before running Serial Loop.

Serial Loop Terminal Test Tool

- Exit the software application that you will be using with the Whozz Calling? device.
- Download the Serial Loop Tool here:

www CallerID.com / Downloads / Diagnostic Tools / Serial Loop

Using Serial Loop test tool application

1. Open **Serial Loop** and check the status of all COM ports on computer by using:

Menu Selection: **Tools / Port Scan**

Possible Results

“Port Available” – no other software is using this port, you can connect the Whozz Calling? unit

“Another Program using Port” – the Whozz Calling? unit cannot be used on this port

“CallerID.com unit detected” - This is the COM port that the unit is connected to.

"Modem Detected" – the Whozz Calling? unit cannot be used on this port

Close Port Scan window

2. If the Port Scan detects a CallerID.com unit:
 - a. Select the port number that it found the unit on.
 - b. Use Default Baud Rate of 9600
 - c. Make test calls on all phone lines connected to the unit.
 - d. Raw data results are seen in top window and formatted phone records in the bottom window
 - e. A “No-CallerID” response means the unit could not capture a Caller ID signal; usually the result of:
 - No Caller ID service on the phone line.
 - The phone cord connected to the port is an extension line from a phone system.
 - The phone call was answered before the phone company actually sent Caller ID signaling.
4. If the Port Scan does not detect a CallerID.com unit, then the serial circuitry within the computer, the unit, or both is not functioning properly. You can test the serial port on your computer by using the Loopback Test.

5. **Loopback Test in Serial Loop**

The Loopback test determines whether your computer's serial port hardware is functioning properly. Use Menu selection: **Tools / Port Scan** and then select the “Loopback Test” button at the bottom of the window. Follow the directions on the screen.

- a. If the Loopback is found by the port scan, then your computer's serial port is functioning properly.
- b. If the Loopback is not found, then the serial port being tested is not working properly and cannot be used.
- c. Try connecting the cable to a different serial port on your computer and select the “Rescan” button.

Appendix F - Explanation Of Start Up Sequence And Front Panel Lights

Once the unit is powered on, it goes through a start up sequence. The power light comes on, the channel lights are individually pulsed, the relays are pulsed, and the firmware version of the channel microprocessors is sent. This process takes approximately 5 seconds and thereafter, the unit is operational and is ready to monitor calls.

The unit is shipped from the factory set to detect On and Off Hook by sensing the telephone line voltage (refer to Appendix B, page 16, for more information). Internal jumpers (shunts) can be set to sense On and Off Hook via current flow through the unit. Channel lights will operate differently for voltage and current detect modes

VOLTAGE DETECTION MODE (Normal Factory Default)

A solid channel light indicates that a live phone line is attached and is On Hook. A channel light that goes out and pulses once every second indicates either an Off Hook condition on that line or a live phone line is not attached

The following discussion assumes a live phone line attached to a channel. When a phone goes Off Hook the channel light goes off and pulses every second. The light will come on during every touch tones dialed. When the phone goes back On Hook the channel light will return to solid on. On inbound calls, the channel light will follow the ring pattern on the line. When the ring signal is present the light will be on. Between rings, the light will go off. Also, when the Caller ID signal is sent between the first and second rings, the light will pulse momentarily

CURRENT DETECTION MODE (When Internal Jumpers are Reconfigured to sense loop current)

Channel lights will remain on except when a live line is attached and is On Hook. When a live line goes Off Hook the channel light will go off and pulse every second. As with the voltage detection mode, the light will come on during every touch-tone dialed. When the phone goes back On Hook the channel light will return to solid on. On inbound calls, the channel light will follow the ring pattern on the line. When the ring signal is present the light will be on. Between rings, the light will go off. Also, when the Caller ID signal is sent between the first and second rings, the light will pulse momentarily

Appendix G - Installation Directions

The Whozz Calling? POS is designed to collect call data from standard analog central office telephone lines. It will not work properly when connected to extensions (or station) lines coming from a telephone switch. Connect the unit only to analog phone lines or phone lines that have been converted to analog signaling (i.e. Cable box converters, analog terminal adaptors, etc.).

If your unit connects to a computer through a serial port, the serial port must be functioning correctly and no other software application can be accessing this port. This unit will work with any serial port or COM number setting that your software supports. If you do not have an available serial port on your computer, a USB-to-serial adaptor cable can be used. These can be found at any computer store or most office supply outlets. This unit will work properly with any USB-to-serial adaptor cable that is verified as, "correctly installed and operational" within the Windows device Manager

If you unit connects via Ethernet cable, plug it into any switch or router on your Local Area Network. Use the Ethernet Configuration Tool located at www CallerID.com/downloads/diagnostic-tools/ to set the unit to a static IP address within your IP scheme and outside any DHCP range. Refer to the Ethernet Supplement for more details.

Connecting To Phone Lines

There are two basic methods of connecting the monitoring unit to your phone lines: the series (pass through) connection, or the parallel (branch off) connection. The series connection uses both input and output modular jacks on the unit. The parallel connection uses only the input jacks.

Parallel Connection (recommended)

A parallel phone line connection is recommended and often easier since the incoming lines to the building can simply be "branched off" to the unit. This connection allows the unit to be removed from service for troubleshooting or repair without affecting the telephone call path. With this connection only the input ports on the unit are used.

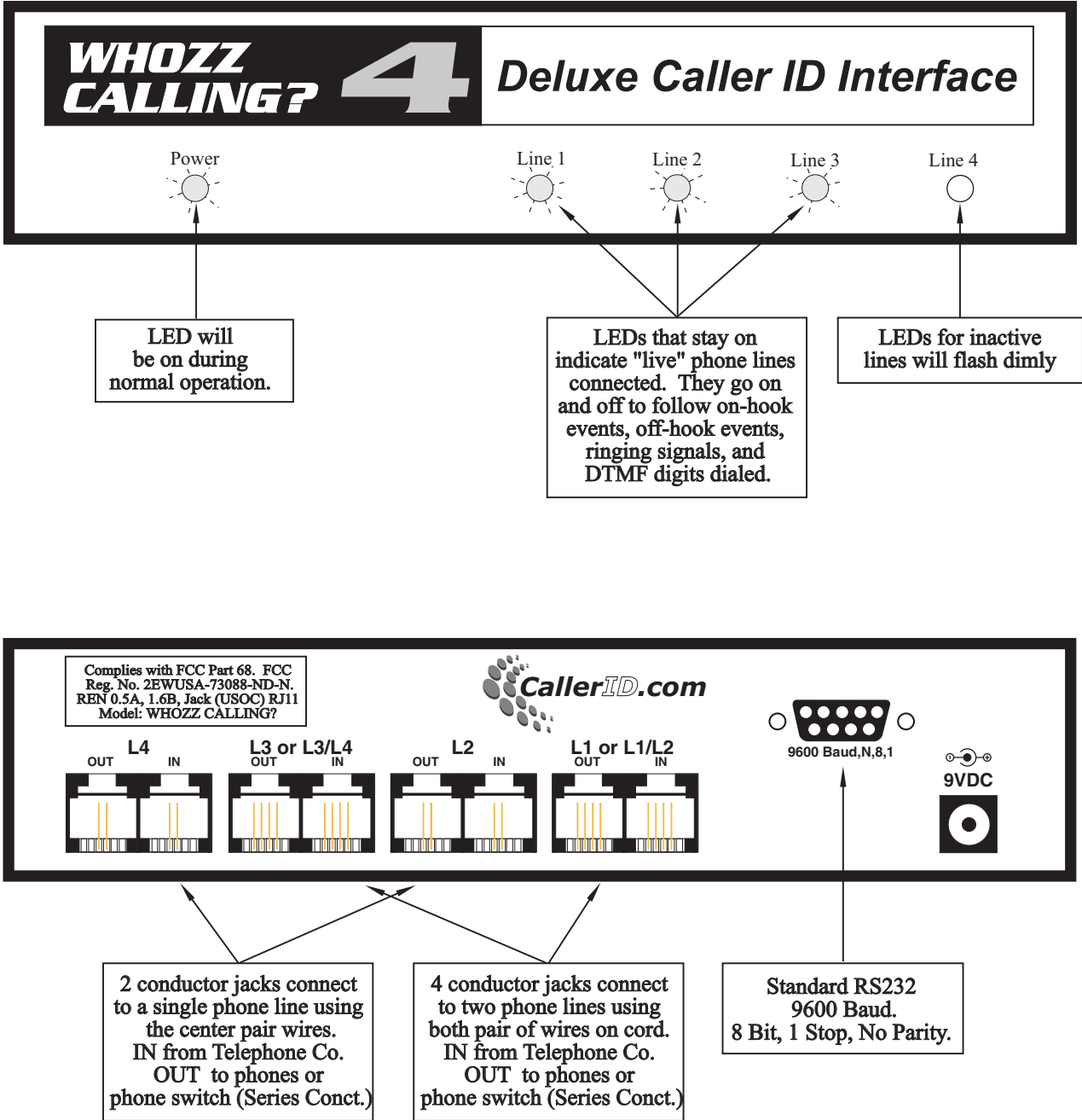
Figures G2a & G2b show parallel connections. This involves branching off or "tapping" from each phone line to be monitored and connecting them to their respective input jacks on the unit. If appropriate, bare wire to modular adapters may be required.

Series Connection

Connecting the unit in series with the telephone lines is required only in special circumstances. Only if you need to operate the unit in a loop current detection mode, require first ring suppression, or are using call blocking would the unit need to be wired in series. with the telephone lines. If the unit is connected in series and then taken out of service, the input and output phone lines have to be connected together to resume normal telephone call flow.

Figures G3a & G3b show series connections. Each phone line to be monitored passes through the unit. Phone lines coming into the building connect to the input jacks on the unit (through bare wire to modular adapters, if needed). Lines connected to the output jacks continue to the desktop phones (through a phone switch, if present).

Fig. G1 Front / Back Views of Whozz Calling? 4 Deluxe (Serial Port Model)



2-Wire (RJ11) or 4-Wire (RJ14) Phone Cord Connections.

Most modular phone cords contain 4 wires which can handle two phone lines (2 wires for each line.) Your system may have either 2 of the wires connected (RJ11 - 1 phone line) or four wires connected (RJ14 - 2 phone lines). The modular connectors on the unit are equipped to handle either arrangement. They are marked similar to the modular connectors on a 2 line phone. For example, Channel 1 is marked "L1 or L1/L2". L1 is for a 2-wire phone cord and L1/L2 is for a 4-wire phone cord. Please refer to Fig. 1.

For a 2-wire (RJ11) system one phone cord simply plugs into each channel on the unit. Caution must be observed when connecting a 4-wire (RJ14) system. Phone cords must only be connected to channels 1 and 3. To prevent crossed telephone lines, do not connect phone cords to channels 2 and 4 on a RJ14 system.

If you are unsure whether your system is 2 wire or 4 wire a quick check can be made using the unit. First, power on the unit. Connect one cord to the input of channel 1. If only the Line 1 light comes on, you have a 2-wire (RJ11) cord. If both Line 1 and Line 2 lights come on, you have a 4-wire (RJ14) cord. Continue checking the rest of your cords in this manor.

CONNECTING TO COMPUTER (for Serial Port models only, else refer to Ethernet Supplement)

You may have purchased a software package designed to work in conjunction with the Whozz Calling? Deluxe unit. The software may have a built-in automatic search and find function. This routine will search all COM numbers in an attempt to determine settings for the serial port with which the unit is connected. If no communication can be established between your software and the Whozz Calling? unit, use our Serial Loop diagnostic tool to help solve the issue. For detailed instructions on working with the Serial Loop Tool refer to Appendix E.

MOUNTING HARDWARE

A one inch wide black plastic mounting bracket is used to attach the unit to a wall or phone board. Remove the two Phillips head screws on the bottom of the enclosure and attach the bracket to the unit with the same screws. Mount on wall using appropriate hardware.

(Recommended connection for units set in the default Voltage Detection mode)

Fig. G2a Parallel Connection for 2-Wire (RJ11) system

Lines coming into the building from the telephone company are connected to the telephone switch or directly to desktop phones. These lines are branched (or tapped) so that they can be connected to the input jacks of the monitoring unit. If these lines are not modular, solid wire to modular adapters need to be installed. The output lines on the unit are not connected.

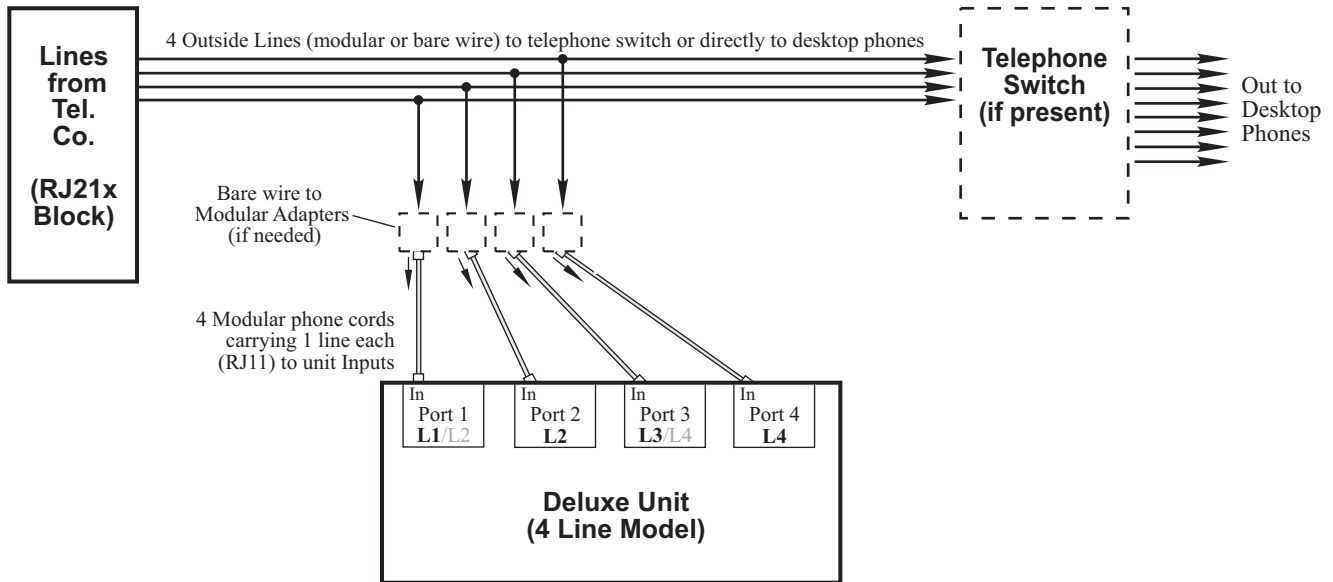
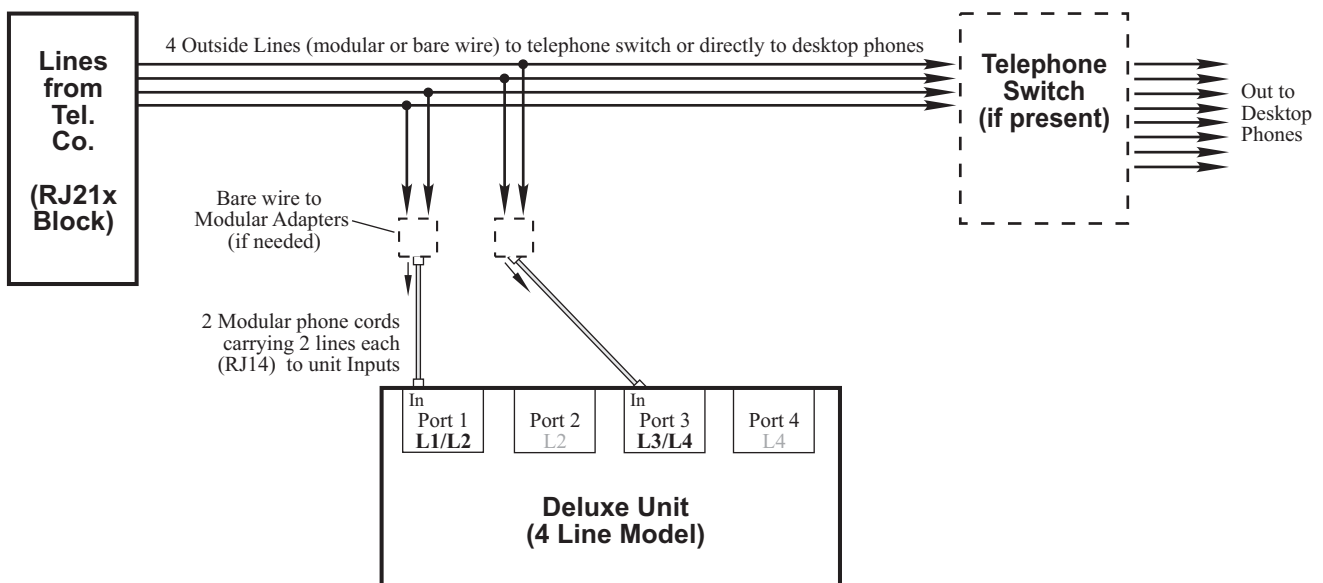


Fig. G2b Parallel Connection for 4-Wire (RJ14) system

In a 4-wire (RJ14) system each phone cord carries 2 phone lines. Notice only 2 cords are connected to the monitoring unit inputs. These cords are connected to Ports 1 and 3. Ports 2 and 4 are not connected.



(Units set to Current Detection mode must be connected in Series)

Fig. G3a Series Connection for 2-Wire (RJ11) system

Lines coming into the building from the telephone company are connected to the input jacks on the monitoring unit. If these lines do not terminate in modular connectors, solid wire to modular adapters need to be installed. The output lines from the unit go to the desktop phones. If a telephone switch is present, they connect through the switch first.

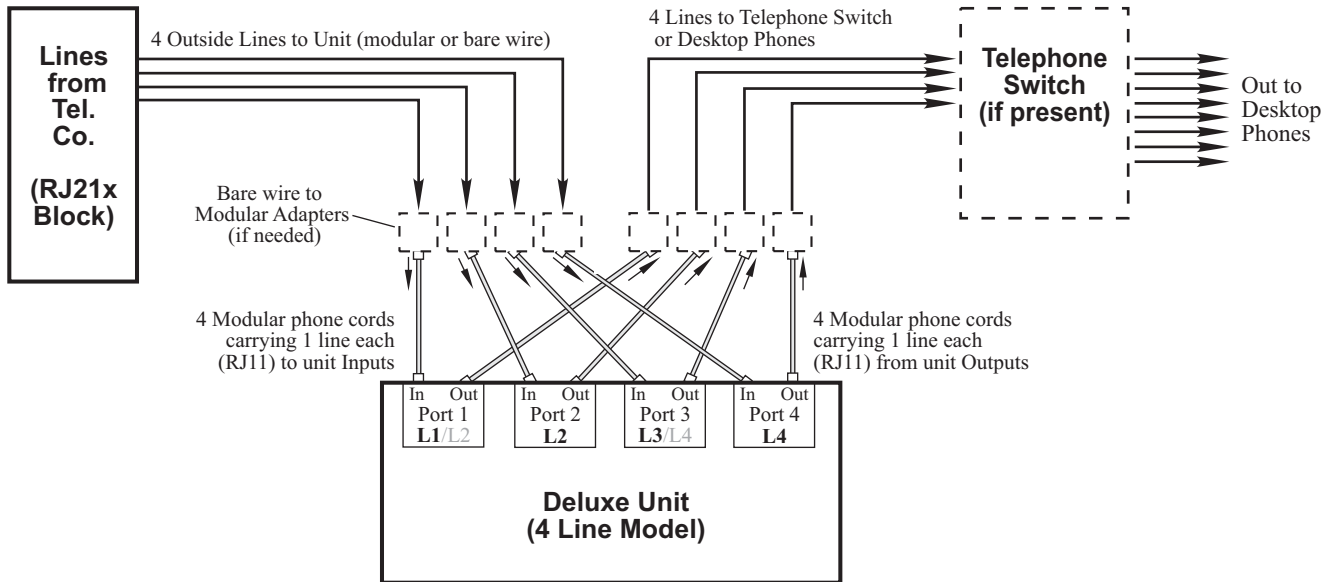
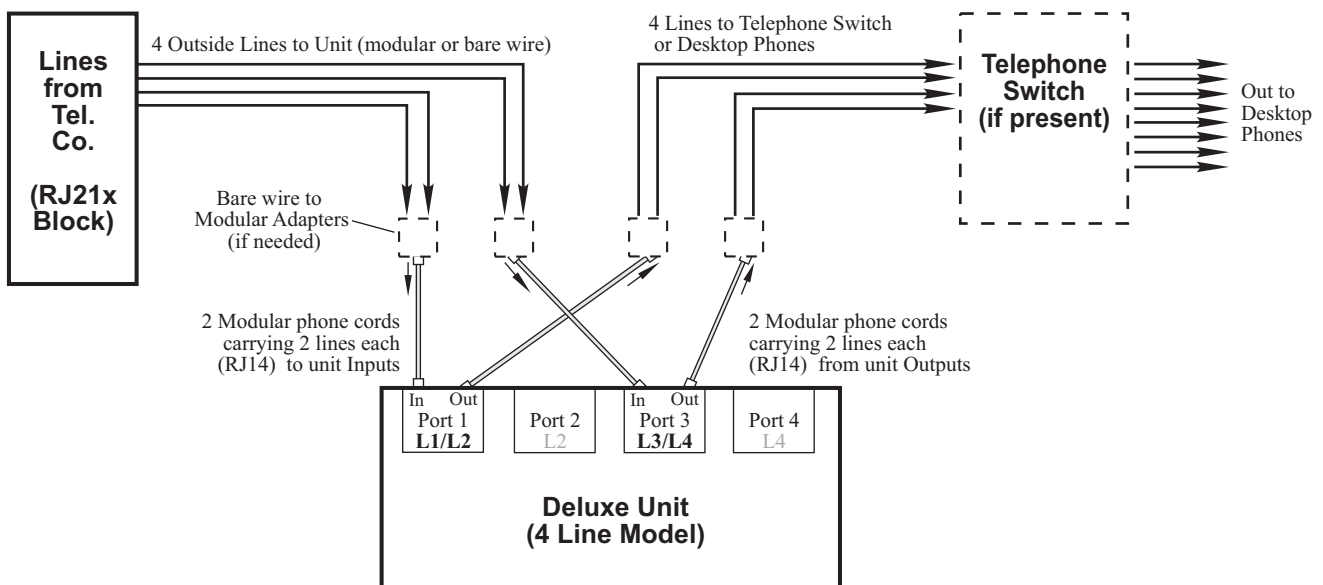


Fig. G3b Series Connection for 4-Wire (RJ14) system

In a 4-wire (RJ14) system each phone cord carries 2 phone lines. Notice only 2 cords are connected to the inputs and of the monitoring unit. These cords are connected to Ports 1 and 3. Ports 2 and 4 are not connected.





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