

# Understanding and Configuring Caller ID in Kazoo

## Key Terms

Account - The current logged in Kazoo tenant account.

User – A configured user in the Account.

Device- A configured endpoint (SIP phone, soft phone etc.) in the Account.

Internal Caller 10 - The caller id metadata exposed when calls are made within the local dial plan of the Account.

Outbound Caller 10 - The caller id metadata exposed when calls are made to external numbers.

## Caller ID Precedence in Kazoo

Caller ID configuration in Kazoo can be confusing at first as it can be configured in several areas of the product and is governed by some rules precedence.

The order of precedence for caller id in Kazoo is as follows:

1. User
2. Device
3. Account
4. Default Company Caller ID
5. Extension Number or Unknown

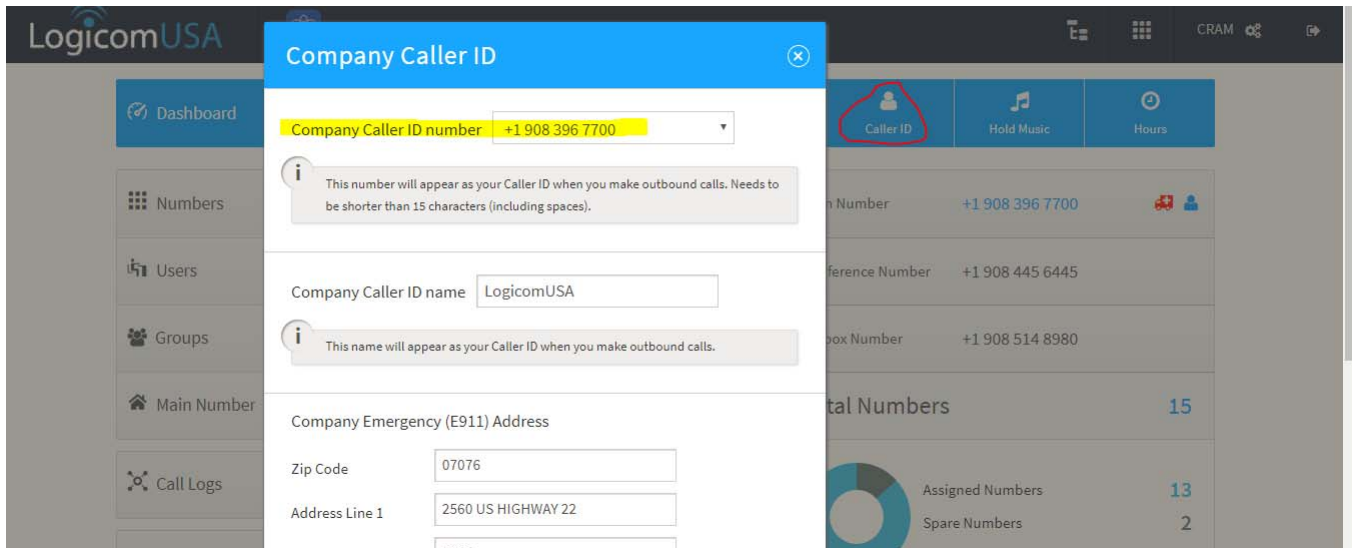
For example, if outbound caller id is set for a user these values would override any configured caller id settings "below" it. Understanding the order of precedence is important when initially planning your caller id strategy or if you find yourself debugging unexpected behavior.

Best Practice: Only configure caller id for the desired call flow entity scope and ensure all higher precedent entity configurations are left blank.

## Configuring Caller ID

When you log into Kazoo for the first time there are no explicit caller id settings configured. If you were to create a SIP device in Smart PBX and place an outbound call, the caller id will be internally set to Unknown. If we next create a user in Smart PBX and assign our existing device to it and place an outbound call, we now see that the caller id is the user extension. In the Smart PBX Dashboard, you will find a "Caller ID" button at the top of the page. This button is accessible after you have configured a Main Number for the account. After a number has been assigned, you can configure the default company caller id. It is set to "None" by default, which will cause caller id to behave just like the device and user in the previous examples. It is recommended you select the main number for you company caller id in the dropdown.

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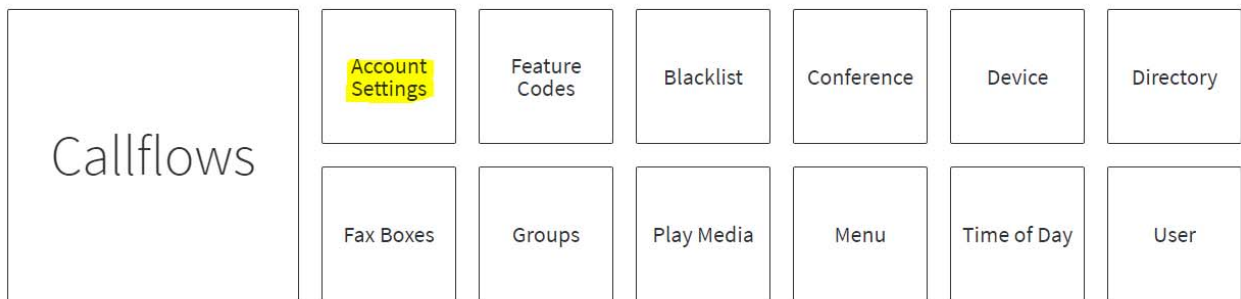


### Advanced Configuration:

This section covers how to further control caller id via Advanced Callflows and is intended for advanced users only. It is not recommended to use Advanced Callflows in conjunction with Smart PBX



Click on what you would you like to configure:



If you desire to set caller id account wide, it will use the company caller id configuration by default. If you wish to customize this, navigate to Callflows App ->Account Settings where you can select another one of the account's provisioned numbers from the dropdown.

- Caller-ID
- Blacklist
- Misc

### Account's Inbound Caller ID

Caller ID Name:

Caller ID Number:

### Account's Outbound Caller ID

Caller ID Name:

Caller ID Number:

### Account's Emergency Caller ID

Caller ID Name:

Device level settings can be customized by navigating to Callflows App -> Device and setting the desired attributes in the device's detail page.



Click on what you would you like to configure:

Callflows

Account Settings

Feature Codes

Blacklist

Conference

Device

Directory

Fax Boxes

Groups

Play Media

Menu

Time of Day

User

LogicomUSA CALLFLOWS

Search...

+ Add

- Mikes IP550
- Tony-1121
- Andres T48G
- Bobby Softphone
- Andres Xlite

Basic | **Caller ID** | SIP | Audio | Video | Options | Restrictions

Presence ID: 4819440

**In-House Calls**

Caller ID Name: Michael Texidor

Caller ID Number: +19084819440

**Outbound Calls**

Caller ID Name: Michael Texidor

Caller ID Number: +19084819440

User level settings can be Customized by navigating to Callflows App -> User and setting the desired attributes in the user's detail page.

