

# Feature Focus Guide: Caller ID

Core Product: Aloha Takeout  
Last Updated: June 5, 2024

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Atlanta

Georgia

USA

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## Revision Record

| Date              | Version # | Description  |
|-------------------|-----------|--|
| Prior to 12/21/22 | ATO v1.0+ | Introduced support for Caller ID.                              |
| 06/04/2022        |           | Converted document to use new templates.                       |
| 12/06/2022        |           | Updated front cover and back page to reflect new NCR branding. |
| 06/05/2024        |           | Updated document to reflect NCR Voyix branding.                |

## About Caller ID

| Caller ID at a Glance      |   |
|----------------------------|---|
| Core Product               | Aloha® Takeout                                |
| Complementary Products     | Aloha® Quick Service and Aloha® Table Service |
| Separate License Required? | No  |
| Other References           | Aloha Takeout Implementation Guide            |

Aloha® Takeout (ATO) has the ability to synchronize with caller ID (caller identification, CID) devices. One button for each line appears on the Look Up screen. Phone number, other information, and line status appear on the caller ID buttons, as each line rings. The Aloha Takeout Caller ID feature speeds up the process of searching for customers and entering phone numbers for new customers.

### The Aloha Takeout Caller ID feature requires:

- You purchase and connect a supported caller ID device to an available port on the Aloha BOH file server (not to any of the POS terminals).
- An electrician pigtails the phone lines to the telephone switch and caller ID device.
- You enable and configure the caller ID feature within Aloha Takeout configuration.
- No additional license or system resources are required to run the caller ID feature.

## Configuring Caller ID

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for caller ID. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

| Procedures at a Glance:   |  |
|---|--|
| If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task. |  |
| 1.  | Source a <b>caller ID device</b> from CallerID.com or Rochelle and configure the hardware as defined. See <a href="#">page 5</a> .   |
| 2.  | Connect the <b>caller ID device</b> to an available COM port on the Aloha BOH file server.   |
| 3.  | Select the <b>Aloha Takeout icon</b> in the product panel, and then access <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Options</b> tab and select the caller ID device, COM port, and number of phone lines connected. See <a href="#">page 7</a> . |
| 4.  | Select <b>Utilities &gt; Refresh POS &amp; All Products</b> to refresh the data, and then restart the <b>Radiant Takeout and Delivery service</b> .  |

## Configuring the Caller ID hardware

Aloha Takeout supports Caller ID equipment from two companies. Rochelle and CallerID.com; each offer two models that interface well with Aloha Takeout, as follows:

**CallerID.com** — [www.callerid.com](http://www.callerid.com) (Norcross, GA)

- **Whozz Calling? 2, 4 & 8** line (Aloha chipset). This is the 'deluxe' model and supports line disconnect functionality. No DIP switches or configuration needed.
- **Whozz Calling? POS 2, 4, & 8** (Aloha chipset). This is the 'basic' model. Locate the DIP switches on the front of the unit and set them to the off position.

**Rochelle** — [www.rochellecti.com](http://www.rochellecti.com) (Austin, TX)

- **Model 2045**. This is the 'full-feature' model and supports line disconnect functionality. No DIP switches or configuration needed.
- **Model 2050**. This is the 'basic' model. Remove the cover to access the DIP switches. Set all DIP switches to the off position.



### Note

Each type of caller ID device has its own configuration requirements. These requirements may include configuring a set of DIP switches, or making other device changes, in addition to port configuration in the operating system. Consult the documentation for your device for the correct configuration requirements before attempting to connect or use it.

For the caller ID device to get line information, you need to pigtail the incoming lines to the telephone switch and the caller ID device. Consult with your caller ID manufacturer and confirm your phone switch will work with the caller ID device.

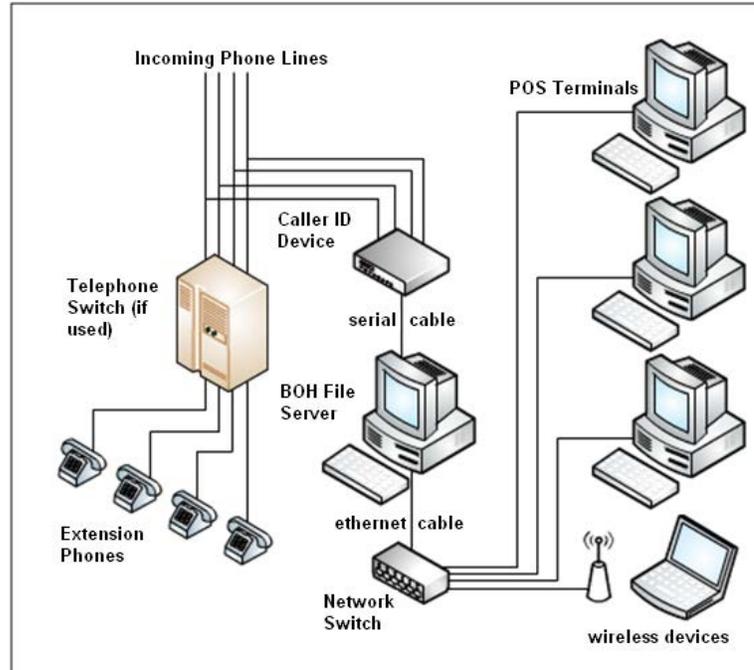


Figure 1 System Riser for Caller ID

**To connect a caller ID device to the system:**

1. Connect the **caller ID device** to an available COM port on the Aloha BOH file server.
2. Allow the computer to install any **software** or **drivers**.
3. Attach all **telephone lines** to the caller ID device.

## Defining a Caller ID device in Takeout Settings

This section guides you through configuring the caller ID device type, number of phone lines, and other options in Takeout Settings.

### To define a caller ID device in Takeout Settings:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.

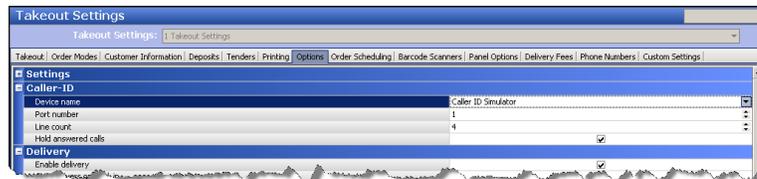


Figure 2 Takeout Settings > Options > Caller-ID Group Bar

2. Under the 'Caller-ID' group bar, select the **caller ID device** manufacturer/model from the 'Device name' drop-down list.
3. Select the **COM port number**, on the Aloha BOH file server, to which you connected the caller ID device in 'Port number.'
4. Type the **number of phone lines** you will connect to your caller ID device in 'Line count.'
5. If necessary, select **Hold answered calls** to place incoming calls on hold.
6. Click **Save** and exit the **Takeout Settings** function.

## Refreshing POS data and restarting the service

After all settings are in place in Aloha Manager, you must select **Utilities > POS > Refresh POS & All Installed Products** to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click **OK** to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

### **Caution**

Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time. After the data refresh, you must restart the Radiant Takeout and Delivery service for Aloha Takeout to begin monitoring caller ID information from the device.

## Using Caller ID

Use the following steps to accept a call in Aloha Takeout and select or create a customer based on the caller ID information for a selected line. Using the caller ID feature requires you to interact with both the phone and the Aloha Takeout terminal.

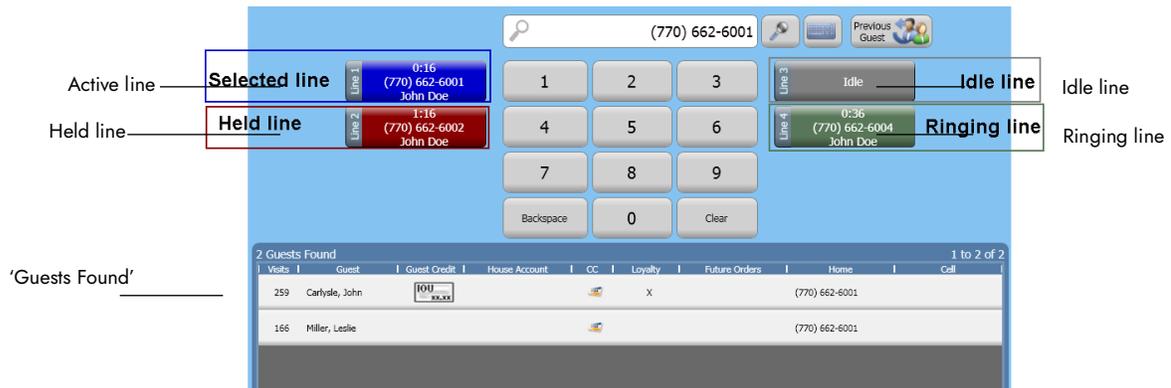


Figure 3 Look Up Screen with Caller ID Enabled

### To use caller ID in Aloha Takeout:

1. Select the **Look Up screen** in Aloha Takeout.
2. When a line rings, Aloha Takeout changes the caller ID button color from gray to green to indicate a line is ringing. Select a **ringing line** on the Look Up screen.  
Once you select a line, the caller ID button color changes from green to blue. An "In Use" message appears on the line on other ATO terminals.  
The system automatically searches for customers that match the phone number and results appear in the 'Guests Found' section of the Look Up screen. "No Matches" appears if the phone number does not match a customer in the Aloha Takeout database.
3. Answer the **corresponding line** on the phone.
4. Confirm the **customer information** over the phone and select the **corresponding customer** in the 'Guests Found' section of the Look Up screen.  
— OR —  
Touch **New Guest** to create a new customer profile. The system automatically populates the phone number based on the caller ID information.
5. If configured and you need to place a call on hold, select the **hold** key on the telephone and touch the **caller ID button** on the Look Up screen. Aloha Takeout changes the caller ID button color from blue to maroon on all ATO terminals, to indicate the call is on hold.

## Troubleshooting Caller ID

### **Q) No lines appear in the caller ID bar.**

**A)** Verify 'Line Count' is correctly configured in the Aloha Takeout configuration.

### **Q) Caller ID buttons do not display phone numbers.**

**A)** Solution 1: Verify you connected the caller ID device **serial cable** to the correct port number.

**A)** Solution 2:

- a. Verify the **COM port** configured for the caller ID device is not in use by a different device or application.
- b. Stop the **Radiant Takeout & Delivery service**.
- c. Select **Start > Programs > System Tools > Communications > Hyperterminal**.
  - i. Test the **analog connection** using HyperTerminal, AT\_RO=1.
  - ii. **Place a call to one of the phone lines. You should see that data appearing in the Hyperterminal window. If nothing appears and you verified the COM port, contact someone to verify the phone lines are pigtailed and terminated correctly.**

**A)** Solution 3: Verify you configured the **Caller ID device** correctly.

- a. For caller ID devices with DIP switches, confirm all **dip switches** are in the off position.
- b. Set the **baud rate** to 2400 for Rochelle; or **9600** for CallerID.com.

### **Q) Unable to hold incoming calls.**

**A)** Verify you enabled 'Hold answered calls' in the Aloha Takeout and Delivery configuration.

### **Q) Demo information appears on Caller ID buttons.**

**A)** Verify you selected a supported caller ID device type from the 'Device name' drop-down list, not 'Caller ID Simulator.' Once you select a supported **caller ID device**, refresh the **system** and restart the **Radiant Takeout and Delivery** service.

## Caller ID, Feature Focus Guide

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