CallerID.com
IDENTIFY | CONNECT | EMPOWER

Make every returning caller feel remembered

Customer guide · Subscription information · 01NOV26

Generated by Rod Mac Kenzie · Managing Director

A familiar voice deserves a conversation that does not start from scratch.

CallerID helps identify incoming callers through compatible POS or business software. When a caller matches a record, your team can use the information already in that system to ask better questions and provide more personal service.

Recognize. Confirm. Help.

Bring up the matched record, confirm who is calling and continue the conversation. Caller recognition is a starting point—not identity verification, a diagnosis or permission for additional work.

Restaurants: focus on the order

When supported by your POS, customer records can put saved details within reach. Confirm that the information is still correct, then focus on what the customer wants today instead of repeating every question.

> "Welcome back. Are we delivering to the same address today? What can we get started for you?"

Auto repair: continue the service relationship

Use the history in your compatible shop software to follow up on previous work and explain documented maintenance needs. Show what needs attention now, what can wait and the price of each option.

> "How has the car been running since your last visit? We noted a tire inspection for next time. Would you like us to check them and show you the measurements before you decide?"

Home services: understand the home

Review equipment and past service details in your compatible software. Confirm that records are current, address the immediate problem first and ask permission before discussing other concerns.

> "We'll address the furnace first. Has the older water heater in our records been replaced? If not, would you like an assessment while we're there? We can explain separate options and any genuine savings from coordinated work."

Equipment age alone does not establish a need for replacement. Combine work only when suitable, with qualified trades and an approved, itemized quote. Do not promise a discount before confirming the actual costs.

CallerID.com
IDENTIFY | CONNECT | EMPOWER

A useful conversation. A practical next step.

Customer guide · Subscription information · 01NOV26

Generated by Rod Mac Kenzie · Managing Director

Build a service habit—not a sales script

1. **Confirm the caller and record.** Shared phone numbers and outdated details can produce an incorrect match. Verify before discussing private information.
2. **Ask about the previous experience.** Resolve outstanding concerns before suggesting anything new.
3. **Make relevant recommendations.** Use documented needs and current findings, not assumptions or pressure.
4. **Explain choices clearly.** Separate urgent needs from work that can wait. Obtain approval before extra work.
5. **Record the outcome.** Keep contact preferences current. Follow up through your business software only where available and with appropriate permission.

Only $1.88 per business day.

The base subscription includes one four-line Deluxe Analog device or one four-channel Vertex VoIP device, free telephone technical support and covered replacement while actively subscribed.

> **$49/month + $199 setup · 36-month initial term.**
>
> Only **$1.88 per business day**: $49 divided by 26 average operating days per month at six days a week, rounded. The **$199 one-time setup** is separate. Applicable tax and shipping are additional. This is monthly billing, not daily billing.

Use your own numbers

Potential additional sales = average ticket × assumed additional or retained completed transactions. Contribution = those sales × the contribution margin remaining after variable costs.

Restaurant illustration: 14 additional completed orders in a month × $14.50 × 30% = **$60.90 in contribution**. That exceeds the $54.53 average monthly subscription cost, including setup allocated over 36 months. Thirteen orders is the mathematical minimum at these inputs; fourteen adds a one-order buffer.

Illustration only—not an industry average, sales forecast, net-profit claim or guarantee. Faster handling does not create demand. Count only genuinely additional or retained transactions, not existing sales. Include extra labor, parts, discounts and service costs in the margin.

Check compatibility before ordering

Select your software, Analog or VoIP, and line or channel count. Confirm the required device connection and installation-specific requirements before ordering. Customer history, photos, reminders, messaging and scheduling belong to your existing software where supported; they are not standalone CallerID device features.

Request a quotation: No online enrollment or payment. Telephone service, on-site service and power-surge damage are not included. Replacement shipping is not promised free. Free telephone technical support and covered replacement apply only while subscribed. Receive the complete agreement, including renewal, cancellation, equipment ownership and return requirements, before deciding. This guide is not a subscription agreement.

Further reading: AAA's historical repair-trust guidance (2016) and ENERGY STAR contractor-selection guidance. These sources support informed service decisions, not CallerID earnings claims or endorsements.