

How To: Caller ID/LCP Settings & Call Interceptor Program

CallerIDs/LCP & Call Interceptor System:

A How To Guide for PDs

The Realtime CallerID Adjustment System is the single, authoritative source for managing the outbound CallerID numbers used on your studies -- no more dropping or relaunching a job just to update the number list, and no separate Survox or MAXWell setup steps required.

When active on a study, this system controls the CallerID used on outbound calls in real time. Changes made here take effect on the very next call -- instantly, with no reload required.

Five modes are available per study, switchable any time:

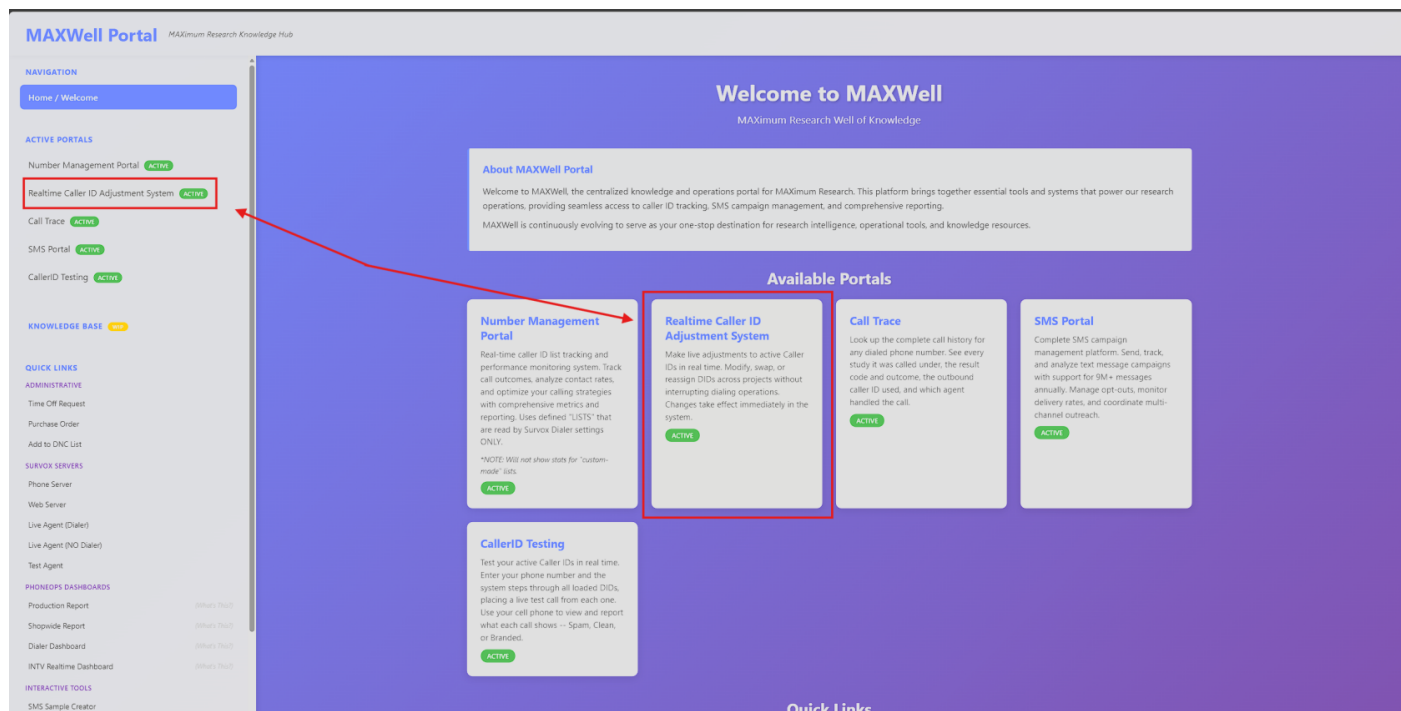
- **Use List** -- Rotates through the phone numbers you type in below, one per call, in the order you entered them.
- **Use LCP** -- Automatically picks a number that shares the same area code as the number being dialed, from the shared master list. No numbers to type in -- this list is maintained outside the portal.
- **Use TF** -- Rotates through the toll-free numbers in the shared master list. This is NOT a brand-new random pick on every call -- one random starting point is chosen, then it moves through the toll-free list in straight round-robin order call after call, the same way List mode does.
- **Use Random** -- Rotates through the non-toll-free numbers in the shared master list. Same as TF above -- NOT a brand-new random pick every call, just a random starting point followed by straight round-robin rotation through that list.
- **Disable (Use Survox List)** -- Turns rotation off for this study. Warning: this does not simply turn rotation off and leave your old CallerID behavior in place -- it will cause 856-874-9001 to be used as the CallerID for ALL calls in this study, unless a different number or list is set in the study's Dialer Config screen in Survox AND the study is reloaded.

Note: If a job does not exist yet in the Realtime CallerID Adjustment System, it will automatically be created once a call is dialed on it, and defaulted to LCP mode until it is set up with a different mode.

Switching between modes preserves your existing list in the background, so you can flip back and forth without losing your work.

Using the Realtime CallerID Adjustment System

In MAXWell, click on the "Realtime CallerID Adjustment System" menu/box.



CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

[Create New Job](#)[Edit Existing Job](#)

CallerID Selection Method

[Use List](#)[Use LCP](#)[Use TF](#)[Use Random](#)[Disable \(Use Survox\)](#)[What's the Difference?](#)

Study Name

Enter the study name exactly as it appears in Survox

Phone Numbers (one per line)

2015551234
2015555678
2015559012

Enter one phone number per line. No dashes or parentheses needed.

[Submit](#)

Create New Job / Edit Existing Job

Self-explanatory -- choose whichever applies to your situation. If your job does not exist yet in the system, it will be created automatically once a call is dialed on it, and defaulted to LCP mode until you set it up with a different mode.

Mode Selection

Choose the mode for the study: Use List, Use LCP, Use TF, Use Random, or Disable. See the mode descriptions above for details on each.

CallerID Selection Method

Use List

Use LCP

Use TF

Use Random

Disable (Use Survox)

What's the Difference?

Use List
Rotates through the phone numbers you type in below, one per call, in the order you entered them.

Use LCP
Automatically picks a number that shares the same area code as the number being dialed, from the shared master list. No numbers to type in -- this list is maintained outside the portal.

Use TF
Rotates through the toll-free numbers in the shared master list. This is NOT a brand-new random pick on every call -- one random starting point is chosen, then it moves through the toll-free list in straight round-robin order call after call, the same way List mode does.

Use Random
Rotates through the non-toll-free numbers in the shared master list. Same as TF above -- NOT a brand-new random pick every call, just a random starting point followed by straight round-robin rotation through that list.

Disable (Use Survox List)
Turns rotation off for this study. **Warning:** this does not simply turn rotation off and leave your old CallerID behavior in place -- it will cause 856-874-9001 to be used as the CallerID for ALL calls in this study, unless a different number or list is set in the study's Dialer Config screen in Survox AND the study is reloaded.

Study Name

This field **MUST** match the Survox study name letter for letter. Case does not matter.

If the Study Name does not match exactly, the system won't recognize it as the same job. Since the Interceptor auto-creates a job the moment a call is dialed, a mismatch results in TWO jobs existing for the same study -- the one you manually created, and a separate auto-generated one (defaulted to LCP) under the name Survox is actually sending. For example, if you create a job called "oh_state" but the Survox study name is actually "ohstate," you will end up with two separate jobs listed: your "oh_state" job, and an auto-generated "ohstate" job.

Phone Numbers

Paste in the actual numbers you want to use, one per row. This field is only valid if using "Use List" mode.

CallerID Selection Method

Use List	Use LCP	Use TF	Use Random	Disable (Use Survox)
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What's the Difference?

Study Name

csmt

Phone Numbers (one per line)

8884163094
8884163123
8884163135
6784480808
8339177143

Enter one phone number per line. No dashes or parentheses needed.

When you are happy with your selections, click the green "Submit" button at the bottom. Your new Interceptor task will be created and active immediately.

Edit Existing Job

The only real difference here is that the Study Name type-in box becomes a dropdown, letting you select an existing project. All other steps and notes covered above are the same.

CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

Create New Job	Edit Existing Job
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Select Existing Study

-- Choose a study --

There are 2 additional options available when editing an existing job:

CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

[Create New Job](#)[Edit Existing Job](#)

Select Existing Study

csmt

CallerID Selection Method

[Use List](#)[Use LCP](#)[Use TF](#)[Use Random](#)[Disable \(Use Survox\)](#)[What's the Difference?](#)

Study Name

csmt

Phone Numbers (one per line)

8884163094
8884163123
8884163135
6784480808
8339177143

Enter one phone number per line. No dashes or parentheses needed.

[Save List \(Download .txt Backup\)](#)[Submit](#)

Danger Zone

Use this only when a study is finished and no longer needs a CallerID rotation entry. This removes the study from the system entirely, and **it cannot be undone or restored**. Use the "Save List" button above first if you want to keep a backup copy of the numbers.

[Remove Study](#)

If you plan to remove a study, it's recommended to use Download List right beforehand to save a record of the settings -- though this is completely optional.

- **Download List** -- Creates a txt file for you to save when a project is done, so you can store the settings for later reference, should the job come back, or if someone asks how it was set up.
- **Remove Study** -- Completely DELETES the project from the Interceptor program. This should ONLY be done after a project has concluded fielding and is billed. Doing so helps keep the database at a minimum and running smoothly. *Note: If a study is removed prematurely, the system will only recreate the job (defaulting it back to LCP mode) once a call is actually dialed on it afterward.*

Notes

- Numbers and Mode changes are INSTANT, starting with the very next call.
- All changes are logged and stored for historic reference (Brian access needed to view logs).
- Adding a number into a list multiple times "weights" it, so it gets used more frequently.

Verifying Your Changes

To check your changes are working, you can view the Realtime Dashboard from MAXWell's Number Management Portal. You should see the changes reflected within a few minutes.

The screenshot displays the MAXWell Number Management Portal interface. On the left is a sidebar with navigation links under categories like 'ACTIVE PORTALS', 'KNOWLEDGE BASE', 'QUICK LINKS', 'SURVOX SERVERS', and 'PHONEOPS DASHBOARDS'. The 'Number Management Portal' is marked as 'ACTIVE'. A red arrow points from this link to a red box highlighting the 'Real-Time Contact Rate Dashboard' in the 'Project Contact Rate Reports' section. This dashboard is labeled '[LIVE]' and 'CURRENT'. It provides a live phone-only dashboard in 10-minute blocks, tracking agent activity and contact rates in near real-time using TCDIALER and PITCHBUSH log data. Below the description are links for 'View Report' and a list of features including real-time 10-minute blocks, agent activity tracking, live contact rate monitoring, phone-only per fielding, and auto-refresh capability. Other reports shown include 'Hourly CID Contact Rate Tracker', 'TF vs LCP Connect Rate Tracker', and 'Weekly CID Calls Tracker', each with their own 'View Report' links and feature lists.

- If you switched modes or added new numbers to a List, you should start seeing new numbers appear with calls from them in the table for the study.
- If you removed a number from a List, or switched away from a mode, the numbers no longer in use should stop incrementing shortly (calls still live from before the change can still cause minor increases).

LACH26CEAnchorDials: 2,979 | Agents: 19 | Connects: 2,579 | Contacts: 375 | Rate: 12.6%

CallerID	TOTAL					21:00 - 22:00 (Hourly)					21:40 - 21:50					21:30 - 21:40					21:20 - 21:30					21:10 - 21:20					
	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	
TOTAL	2,979	19	2,579	375	12.6%	260	5	224	36	13.8%	12	3	10	4	33.3%	70	5	58	10	14.3%	65	5	54	12	18.5%	61	5	5	11	4	18.2%
8184959165	488	19	427	57	11.7%	43	5	35	10	23.3%	3	2	3	2	66.7%	11	5	9	2	18.2%	11	5	7	3	27.3%	11	4	4	10	4	27.3%
4243196369	504	19	431	64	12.7%	44	5	41	7	15.9%	2	2	2	0	0%	13	4	13	2	15.4%	10	5	8	3	30%	10	4	4	10	4	30%
3236214483	494	19	415	55	11.1%	44	5	35	4	9.1%	2	2	2	1	50%	10	4	9	2	20%	12	4	7	1	8.3%	11	4	4	10	4	36.4%
3418992265	493	18	431	56	11.4%	40	5	34	3	7.5%	2	1	1	0	0%	10	5	7	1	10%	10	5	10	2	20%	9	4	4	10	4	44.4%
5627170184	493	19	439	78	15.6%	45	5	41	7	15.6%	2	1	2	1	50%	13	5	10	1	7.7%	12	4	12	2	16.7%	10	3	4	10	3	40%
7144506544	507	18	436	65	12.8%	44	5	38	5	11.4%	1	1	0	0	0%	13	5	10	2	15.4%	10	4	10	1	10%	10	4	4	10	4	40%

LACH26AEAnchorDials: 1,264 | Agents: 7 | Connects: 1,102 | Contacts: 168 | Rate: 13.3%

CallerID	TOTAL					21:00 - 22:00 (Hourly)					21:50 - 22:00					21:40 - 21:50					21:30 - 21:40					21:20 - 21:30				
	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate
TOTAL	1,264	7	1,102	168	13.3%	349	7	313	41	11.7%	25	5	20	3	12%	46	5	43	6	13%	58	6	50	4	6.9%	72	7	6	10	6.9%
2138947076	186	7	163	24	12.9%	51	7	45	4	7.8%	4	3	4	0	0%	8	4	8	0	0%	6	4	5	0	0%	11	7	7	10	10%
6503701024	185	7	158	16	8.6%	54	7	48	5	9.3%	4	3	3	0	0%	7	5	6	1	14.3%	8	4	8	0	0%	11	6	1	10	10%
3236125975	183	7	156	37	20.2%	52	7	45	8	15.4%	4	3	3	2	50%	6	3	5	1	16.7%	9	4	7	0	0%	11	6	1	10	10%
4405511270	181	7	165	29	16%	50	7	46	6	12%	4	3	4	0	0%	7	4	7	1	14.3%	8	5	7	1	12.5%	10	5	1	10	10%
9097476729	179	7	154	22	12.3%	47	7	38	7	14.9%	4	3	2	0	0%	6	3	6	1	16.7%	8	5	5	0	0%	9	6	8	10	10%
6289002317	174	7	150	17	9.8%	49	6	47	4	8.2%	3	2	2	0	0%	6	4	6	1	16.7%	9	5	9	1	11.1%	10	5	1	10	10%
8189382776	176	7	156	23	13.1%	46	7	44	7	15.2%	2	1	2	1	50%	6	4	5	1	16.7%	10	4	9	2	20%	10	5	1	10	10%

LACH26AE Anchor Dials: 1,264 Agents: 7 Connects: 1,102 Contacts: 168 Rate: 13.3%																														
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TOTAL	1,264	7	1,102	168	13.3%	349	7	313	41	11.7%	25	5	20	3	12%	46	5	43	6	13%	58	6	50	4	6.9%	72	7	70	6	10%
2138347076	186	7	163	24	12.9%	51	7	45	4	7.8%	4	3	4	0	0%	8	4	8	0	0%	6	4	5	0	0%	11	7	10	6	10%
6503701024	185	7	158	16	8.6%	54	7	48	5	9.3%	4	3	3	0	0%	7	5	6	1	14.3%	8	4	8	0	0%	11	6	10	6	10%
3236125375	183	7	156	37	20.2%	52	7	45	8	15.4%	4	3	3	2	50%	6	3	5	1	16.7%	9	4	7	0	0%	11	6	10	6	10%
4405511270	181	7	165	29	16%	50	7	46	6	12%	4	3	4	0	0%	7	4	7	1	14.3%	8	5	7	1	12.5%	10	5	10	6	10%
9097476729	179	7	154	22	12.3%	47	7	38	7	14.9%	4	3	2	0	0%	6	3	6	1	16.7%	8	5	5	0	0%	9	6	8	10	88.9%
6289002317	174	7	150	17	9.8%	49	6	47	4	8.2%	3	2	2	0	0%	6	4	6	1	16.7%	9	5	9	1	11.1%	10	5	10	6	10%
8183382776	176	7	156	23	13.1%	46	7	44	7	15.2%	2	1	2	1	50%	6	4	5	1	16.7%	10	4	9	2	20%	10	5	10	6	10%

Common Problems Q&A

Q: I created a job, but the calls are still using the wrong CallerIDs. What happened?

A: This is almost always a Study Name mismatch. Since the system auto-creates a job the moment a call is dialed, a mismatch results in TWO jobs existing for the study -- the one you manually created, and a separate auto-generated one (defaulted to LCP) under the name Survox is actually sending. Double check the dropdown/job list for a similarly-named duplicate job.

Q: What actually happens if I use Disable mode?

A: All calls on that study will use 856-874-9001 as the CallerID -- this is not the same as "leaving CallerID behavior alone." This should be avoided in almost all cases. If you do need to use it intentionally, a list must also be set in the study's Dialer Config screen in Survox, AND the study must be reloaded, or every call will go out on 856-874-9001.

Q: What's the difference between Use TF and Use Random?

A: Use TF rotates through the toll-free numbers in the shared master list; Use Random rotates through the non-toll-free numbers in that same list. Neither one picks a brand-new random number on every call -- each picks one random starting point, then moves through its list in straight round-robin order from there, the same way List mode does. Note: switching modes resets the last number used, so if you switch back to either of these modes later, it could start at a different spot in the list.

Q: When should I use Remove Study?

A: Only after a project has finished fielding and has been billed. It's a good idea to use Download List first to save a copy of the settings before removing. If a study is removed prematurely, the system will simply recreate the job (defaulted back to LCP mode) the next time a call is actually dialed on it.

Q: When should I create my Study?

A: Unlike survox, you can make these projects at anytime, as long as you know what the

programmer is using as the studycode.

Revision #5

Created 2026-07-24 20:33:35 UTC by Admin

Updated 2026-07-31 20:52:57 UTC by Admin