

Survox Dialer - Configuration Options

All projects running in Survox, on the dialer, have 3 main areas of control, that can be modified to meet the study's needs. Each one works in slightly different ways, so understanding each gives users full insight into how the dialer works in terms of the project requirements. The 3 areas are **Dialer Configuration, Dialer Parameters & Dialer Control**. All 3 are located within the **Manage > Study Control** menu in the Survox Console. This is the **ONLY** place these settings can be adjusted.

Dialer Configuration

The Dialer Configuration section of Survox allows you to control how the dialer behaves when a study is started. These settings determine everything from how aggressively the dialer places calls, to what phone number respondents see when they receive a call.

Dialer Configuration is found at: **Manage > Study Control > Dialer Configuration > Study Selection & Go**

Understanding Shopwide vs. Project Settings

The Dialer Configuration screen displays two columns of settings: **Shopwide** and **Project**.

Shopwide represents the default dialer settings for the entire call center. If no project-specific value is entered, Survox will use the Shopwide setting automatically.

Project allows you to override any Shopwide default for a specific study. When a value is set in the Project column, it takes priority over the Shopwide setting for that study only. If a Project field is left blank or set to "---", the Shopwide default remains in effect.

Think of Shopwide as the standard operating baseline, and Project as a study-specific exception to that baseline.

Basic Dialing Options

Abandonment Rate

This setting controls the maximum number of calls the dialer is allowed to drop per 10,000 connects. A setting of 350 equals a 3.5% drop rate.

A **dropped call** occurs when the dialer detects that all agents have become occupied mid-dial, and hangs up the outbound call after 1-3 rings -- before the respondent ever answers. This prevents a respondent from picking up with no agent available to speak with them.

The dialer continuously monitors its own drop rate and attempts to stay just below this threshold. If drops are occurring, the dialer will use this setting to regulate how aggressively it dials. If the dialer is not currently dropping any calls, raising this number will not speed up dialing -- the setting only comes into play when drops are actually happening.

Drop rate is one of several factors that influence overall dialer speed and performance.

Number of Rings to Set "No Answer"

The maximum number of rings the dialer will wait before classifying an unanswered call as a No Answer and moving on.

One important distinction: a "ring" in this context is not tied to the actual ring sound a respondent hears. Instead, the dialer counts each 6.25-second interval after the call connects between the dialer and the telephone carrier as one ring. The audible ringing a respondent hears may not align exactly with what the dialer is counting.

At MAXimum Research, this is typically set to 4 rings (25 seconds). This keeps the dialer from waiting long enough to trigger voicemail and answering machine pickups, which commonly activate around the 30-second mark.

Answering Machine Detection (AM Detection)

This setting tells the dialer how to handle a call when it determines an answering machine or voicemail system has picked up. The available options are:

Detect and Hangup (default) -- The dialer identifies the call as an answering machine or voicemail, codes it accordingly, and ends the call automatically without involving an agent.

Do Not Detect -- AM Detection is disabled. All answered calls are passed directly to an agent, who handles the answering machine or voicemail manually.

Detect and Play Recording -- The dialer identifies the call as an answering machine or voicemail and plays a pre-recorded message before ending the call.

Detect and Pass to IVR -- Routes detected answering machines to an IVR system. This option is not supported at MAXimum Research.

One important limitation to understand: AM Detection is not 100% accurate. It works by listening to the sounds and pauses that occur after a call is answered and uses those timing patterns to

determine whether it is most likely speaking with a real person or an automated system. It can and does occasionally misclassify calls.

Additionally, AM Detection is ignored entirely when the dialer is operating in Power or Preview mode. It only functions in Predictive mode.

Predictive Dialing

A Yes/No setting that controls whether the dialer operates in predictive mode.

When set to **Yes** (default), the dialer uses its built-in algorithm to manage outbound calling automatically -- analyzing agent availability, call patterns, and other factors to dial ahead of demand and keep agents as productive as possible.

When set to **No**, predictive dialing is disabled. The dialer operates as a basic auto-dialer, placing one call at a time per agent only when that agent is ready and requests the next call.

Targeted Mode

This setting only applies when Predictive Dialing is set to **No**. It determines how the dialer behaves in non-predictive operation. The two options are:

Power -- The dialer still handles call progress automatically in the background. Non-productive outcomes such as no answers, busy signals, and disconnects are coded by the dialer without agent involvement. Agents only receive calls that have connected, including answering machine/voicemails/auto-attendants.

Preview -- The agent hears the full call progress in real time, including ringing. The agent remains in control throughout, manually coding the call as a no answer, disconnect, answering machine, or other outcome as appropriate. This is true auto-dialer mode, with the agent making the judgement calls at every step.

Record Whole / Separate Audio / Billing Code / Phone Number Prefix / Phone Number Suffix

These settings are intended for organizations that use Survox strictly as a dialer without conducting interviews through the Survox platform. They are not applicable to MAXimum Research's setup and should not be modified.

Caller ID Type

This setting determines what type of caller ID the dialer will present to respondents when placing outbound calls. The available options are:

File : Uses a pre-defined file containing a list of phone numbers. The dialer cycles through the numbers in the file in round robin order, rotating through each number evenly.

Round Robin / Random : Allows users to enter phone numbers directly into individual fields within the console. The dialer then uses those numbers in either round robin or random order depending on the selection.

"--" : Allows a single static phone number to be entered manually in the Caller ID field below, which will be used for every outbound call on the project.

Caller ID

The behavior of this field changes based on the Caller ID Type selected above.

When **File** is selected, this field displays a dropdown list of all pre-defined caller ID files available on the system. Simply select the appropriate file for the project.

When **Round Robin, Random, or --** is selected, this field becomes an entry area where phone numbers are entered manually.

Call Path

Not used at MAXimum Research. Leave blank.

Dialer Parameters

Located at **Manage > Study Control > Dialer Parameters > Study Selection & Go**, this screen allows limited dialer adjustments while a study is actively running on the dialer. The settings available here are Abandonment Rate, Number of Rings, and Answering Machine Detection.

These changes take effect immediately for the current dialing session only. They are temporary -- the next time the study is loaded onto the dialer, all values will revert back to whatever is saved in Dialer Configuration. If a change needs to be permanent, it must also be updated in Dialer Configuration.

Dialer Control

Located at **Manage > Study Control > Dialer Control > Study Selection & Go**, this screen allows supervisors to control the dialing state of a running study. There are three commands available:

Pause -- Stops the dialer from placing any new outbound calls. Agents who are already at the waiting screen will not receive any notification that the dialer has been paused -- they will simply continue waiting as if between calls. This is useful when a project is nearing its close, or when a large sample hide or reveal needs to be performed without disrupting agents currently on the

waiting screen.

Resume -- Restores normal dialing after a pause. The dialer picks back up where it left off.

Stop -- Ends the study's session on the dialer entirely. Unlike a pause, a stopped study cannot be resumed. The only way to get the study back on the dialer after a Stop is to clear it completely and reload it from scratch.

Saving Changes

Once all settings have been reviewed and adjusted, click **Save Changes** to store the configuration.

Important: changes made to **Dialer Configuration** do not take effect immediately. If the study is currently running, the new settings will not apply until the study is fully shut down, cleared from the dialer, and reloaded. Any changes made mid-shift will not be reflected until the next time the study is brought up on the dialer. Changes made to **Dialer Parameters/Control** ARE instant.

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