Designer User's Guide

Setup Survey Block

5/7/2026

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- Administrator

Use this block to set up a survey that you can offer to customers.

Related documentation:

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> **Important**
> Surveys are not supported on asynchronous chat or messaging channels.

You can use the **Setup Survey** block in the **Assisted Service** phase to set up a survey for the caller.

Typically, you offer the survey earlier in the session, in either the **Self Service** phase or before routing begins in the **Assisted Service** phase. Then, once the customer has been served, place the **Setup Survey** block in the **Assisted Service** phase to provide the survey functions.

Once the block is set, you can choose to start the survey immediately (the customer completes the survey within the **Self Service** phase of the current application), or after the customer has finished talking to an agent (if they agreed earlier to take the survey, the customer is then sent to a number assigned to a survey application).

You can also choose to not start the survey if the customer rejects the offer or to not offer the survey at all.

This video demonstrates how to build a chat-based survey in Designer and how you can use the Surveys dashboard to view and track the results:

Link to video

Using this Block

In most applications, you will place a User Input block before the **Setup Survey** block and use prompts to ask the customer if they want to take a survey. You can then use a Segmentation block to segment the interaction based on the customer's response.

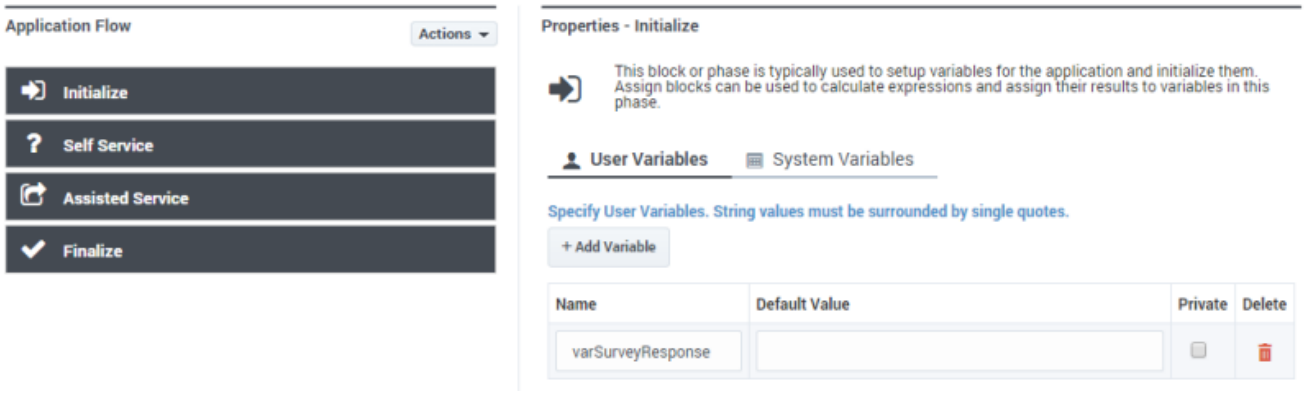
The sections below explain how to incorporate a survey into an existing application. Your application and User Variable names might differ.

Important

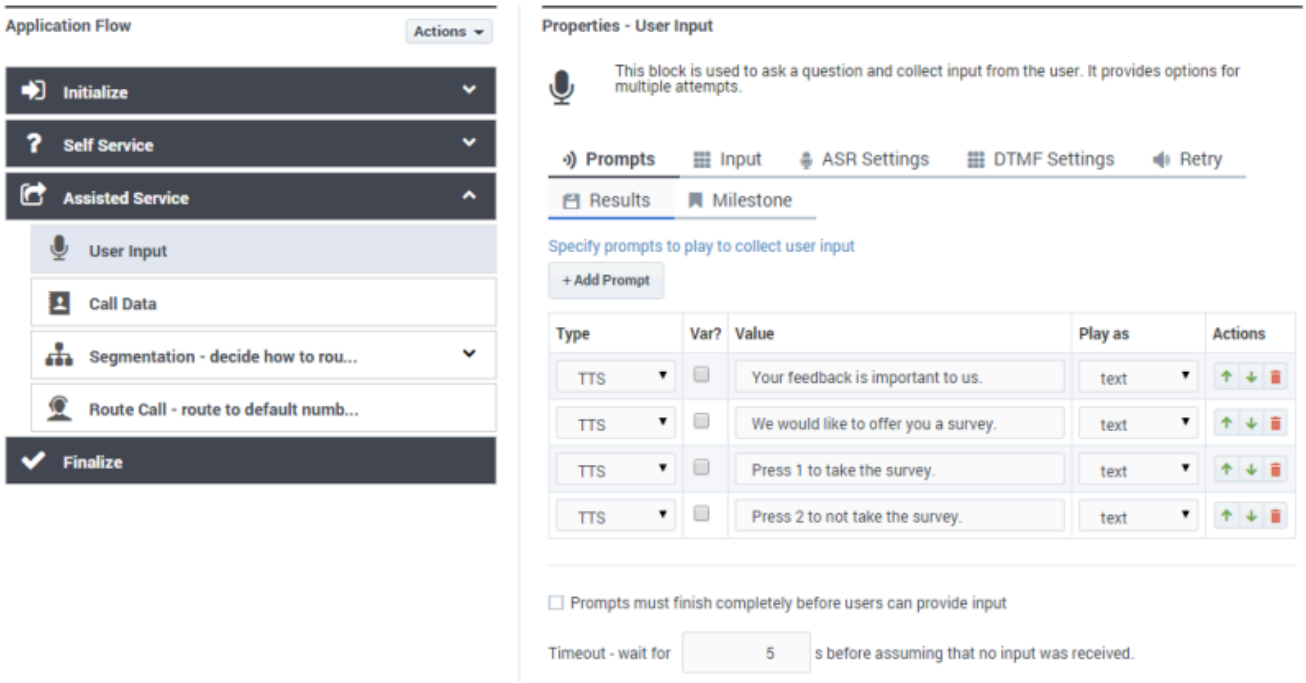
The examples below offer the survey in the **Assisted Service** phase, but it is also possible to offer the survey in the **Self Service** phase. In either case, the **Setup Survey** block must be placed in the **Assisted Service** phase.

Offer the Survey

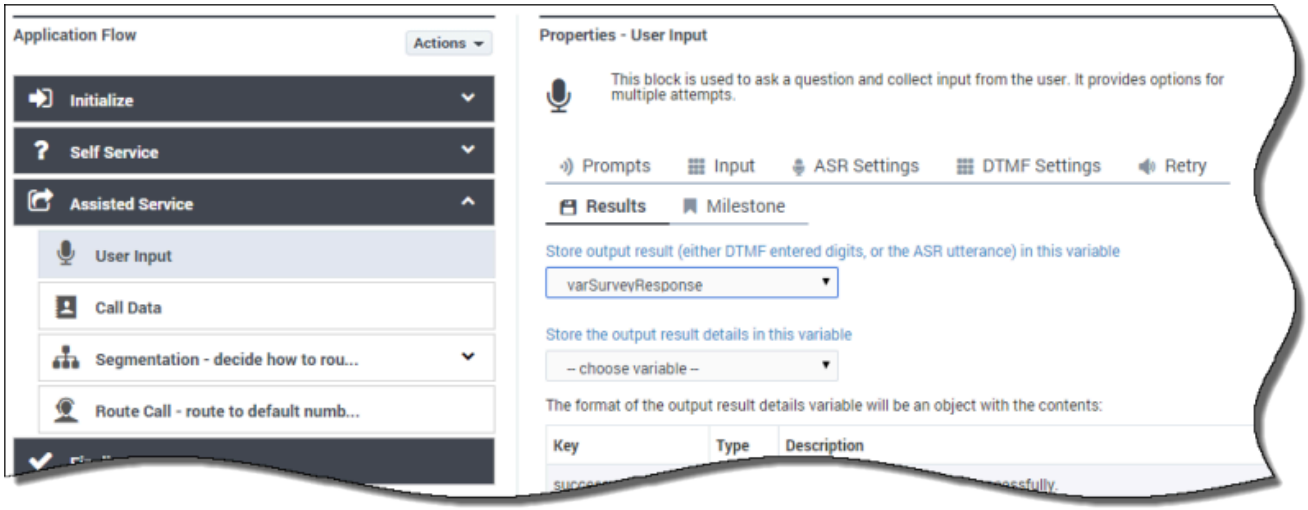
Click the **Initialize** phase and create a **User Variable** named **varSurveyResponse**.



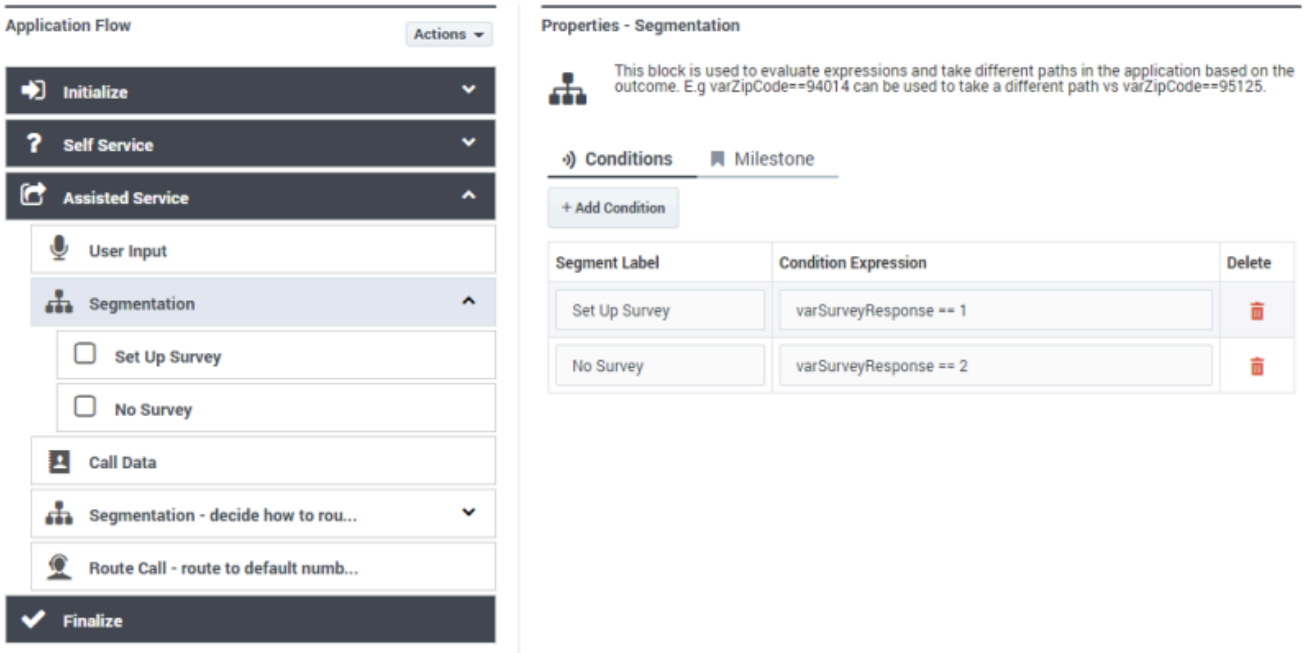
In the **Assisted Service** phase of your application, before the interaction is routed, add a **User Input** block and create a message in the **Prompts** tab. In this example, you can use the following values:



Next, in the **Results** tab, select the **varSurveyResponse** variable that you created earlier. This variable stores the input from the customer.

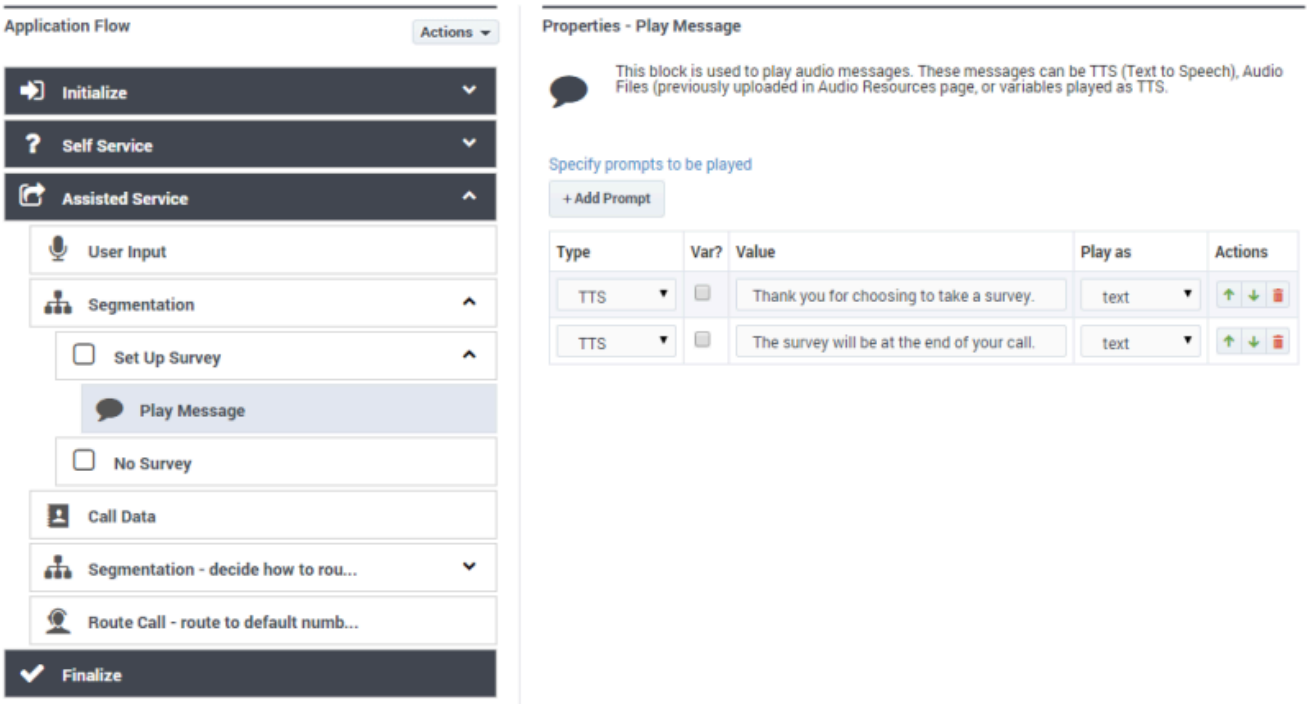


Next, place a Segmentation block to configure how your application responds to the result from the **User Input** block. In this example, configure the **Segmentation** block as shown below:

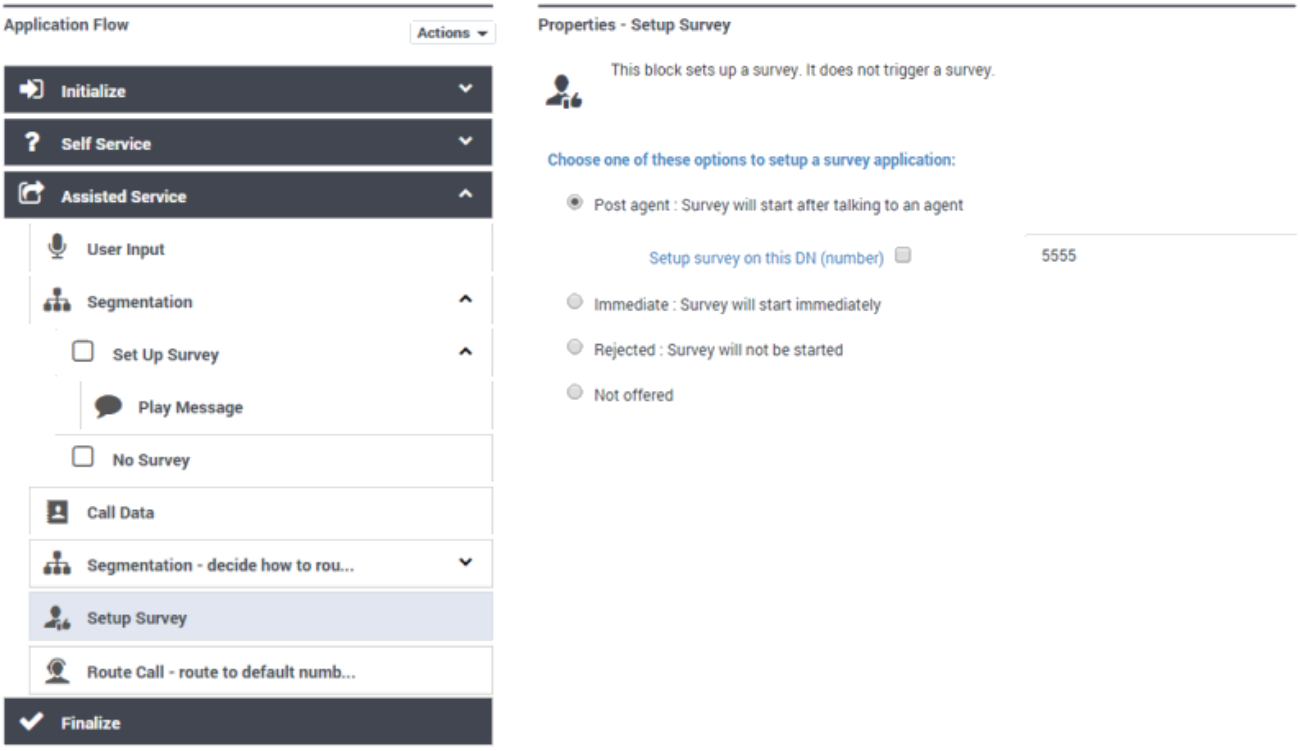


Set Up Survey Segment

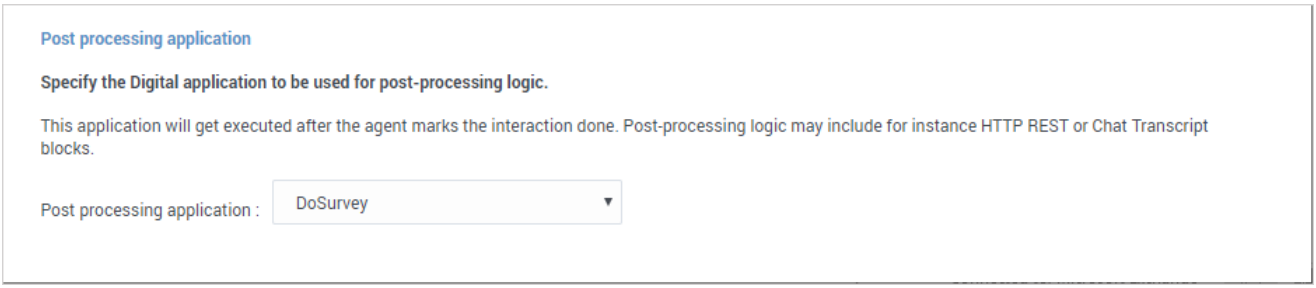
The application processes the **Set Up Survey** segment if the customer pressed **1** to accept the survey. Next, the application uses a Play Message block to thank the customer for taking the survey.



Next, place a **Setup Survey** block before the interaction is routed to an agent and select the **Post agent: Survey will start after talking to an agent** option. Our example is based on a voice interaction, so we'll also enter the DN of the survey application. The example shown below uses the DN 5555, but your survey application might use a different DN. Optionally, you can enable the check box to specify the DN as a variable.



For a chat-based survey, leave the DN field blank. You can specify the name of the chat survey application in the **Advanced** tab of the Route Call Block (or Route Digital Block), under the **Post processing application** section.

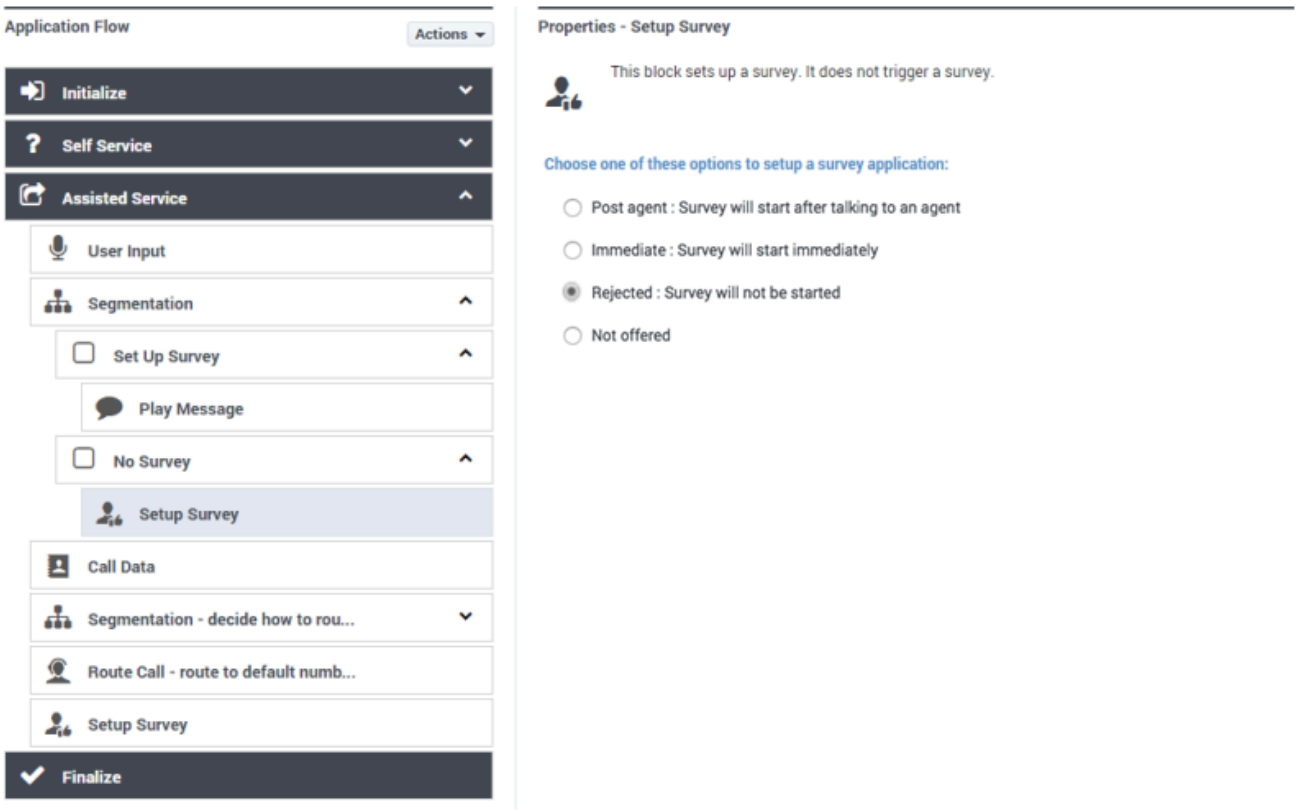


The interaction forwards to the survey application. See the Creating the Survey Application section for more information.

No Survey Segment

The application processes the **No Survey** segment if the customer pressed **2** to decline the survey.

Place a **Setup Survey** block and select **Setup was offered but it was rejected**.



Survey Not Offered

You might have noticed that a third option exists in the **Setup Survey** block - **Setup was not offered - no need to setup survey**.

For reporting, this option records that the customer was never offered a survey. This can happen for several reasons. For example, the customer might have ended the call early or in the **Self Service** phase, or your application might contain a segment in which it does not make sense to offer a survey.

To receive reporting in these scenarios, you must place a **Setup Survey** block in your application and select the **Setup was not offered - no need to setup survey** option to record that this interaction did not include a survey offer.

Creating the Survey Application

The actual survey takes place in a second application. This application is loaded on the number that you specified in the **Setup Survey** block.

A survey application is created with the application type **Default** and behaves in the same way as other applications. You can use **User Input** blocks to ask questions and record responses. Each **User Input** block stores the response from the customer for reporting.

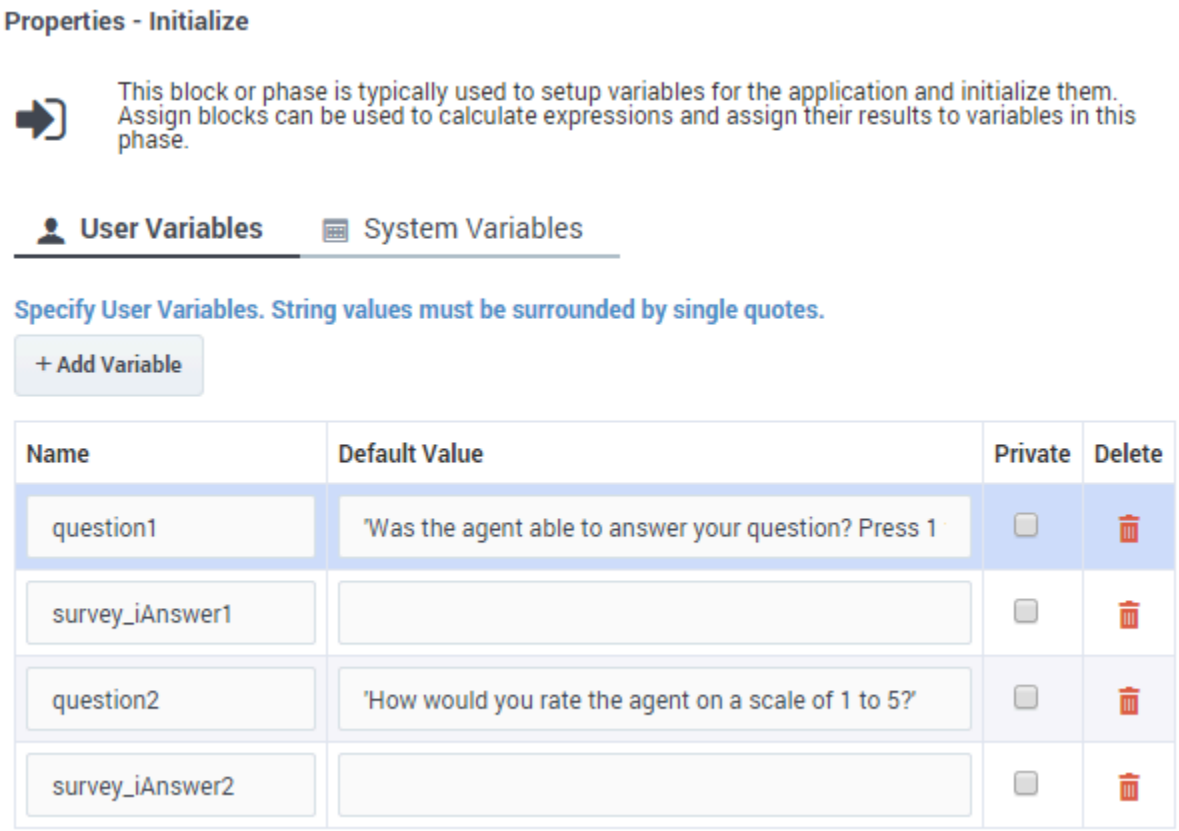
> **Tip**
>
> As survey applications are **Default** type applications, you can use Route Call and various other blocks to direct the call if the customer's survey responses meet certain criteria. For example, if the customer inputs a low satisfaction score, you can use a Segmentation block to check for low satisfaction scores and a **Route Call** block to route the interaction to an agent to follow up on the customer's concerns.

Example

The following example demonstrates how to create a simple survey application.

First, create a new application of type **Default** to provide the survey.

In the application, create a series of variables to hold the questions and answers for your survey. In the example below, **question1** and **question2** hold the question that the survey asks the customer, and **survey_iAnswer1** and **survey_iAnswer2** holds the answer from the customer.



Designer also provides standard variables, which you can view in the **System Variables** tab, that you can use if your company uses standard reporting. For example, instead of using **survey_iAnswer2** to hold the feedback score for the agent, we could instead use **survey_iAgentScore**.

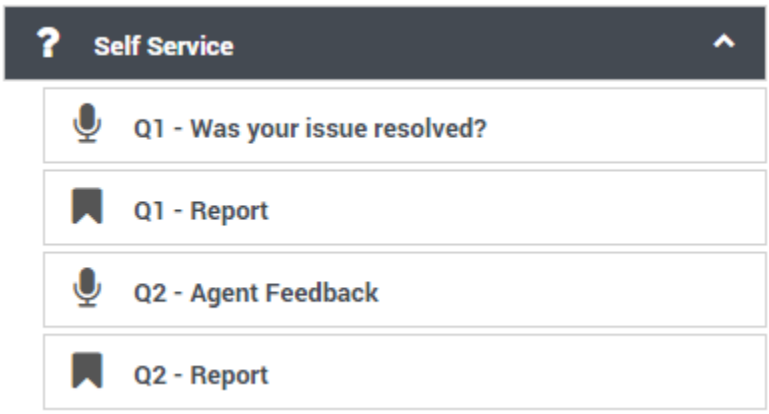
Variable	Editable	Purpose
survey_sOffer	No	Specifies whether a survey was offered, accepted, or rejected. This variable is set by the **Setup Survey** block.
survey_iRecommendScore	Yes	A rating (on a scale from 0 to 10) that indicates if the company, product, or service is recommended. This variable is used for calculating the Net Promoter Score (NPS).
survey_iAgentScore	Yes	Specifies a user satisfaction score for the agent (if this question is asked in the survey).
survey_iCompanyScore	Yes	Specifes a user satisfaction score for the company (if this question is asked in the survey).
survey_iCallScore	Yes	Specifies a user satisfaction score for the entire call (if this question is asked in the survey).
survey_iProductScore	Yes	Specifies a user satisfaction score for the product (if this question is asked in the survey).
survey_sQ1..10	Yes	You can create these variables (1-10) to store **string**-type survey responses that will be used for reporting. (Use the naming convention as shown. For example, *survey_sQ1*, *survey_sQ2*, and so on.)
survey_iQ1..10	Yes	You can create these variables (1-10) to store **integer**-type survey responses that will be used for reporting. (Use the naming convention as shown. For example, *survey_iQ1*, *survey_iQ2*, and so on.)

Important

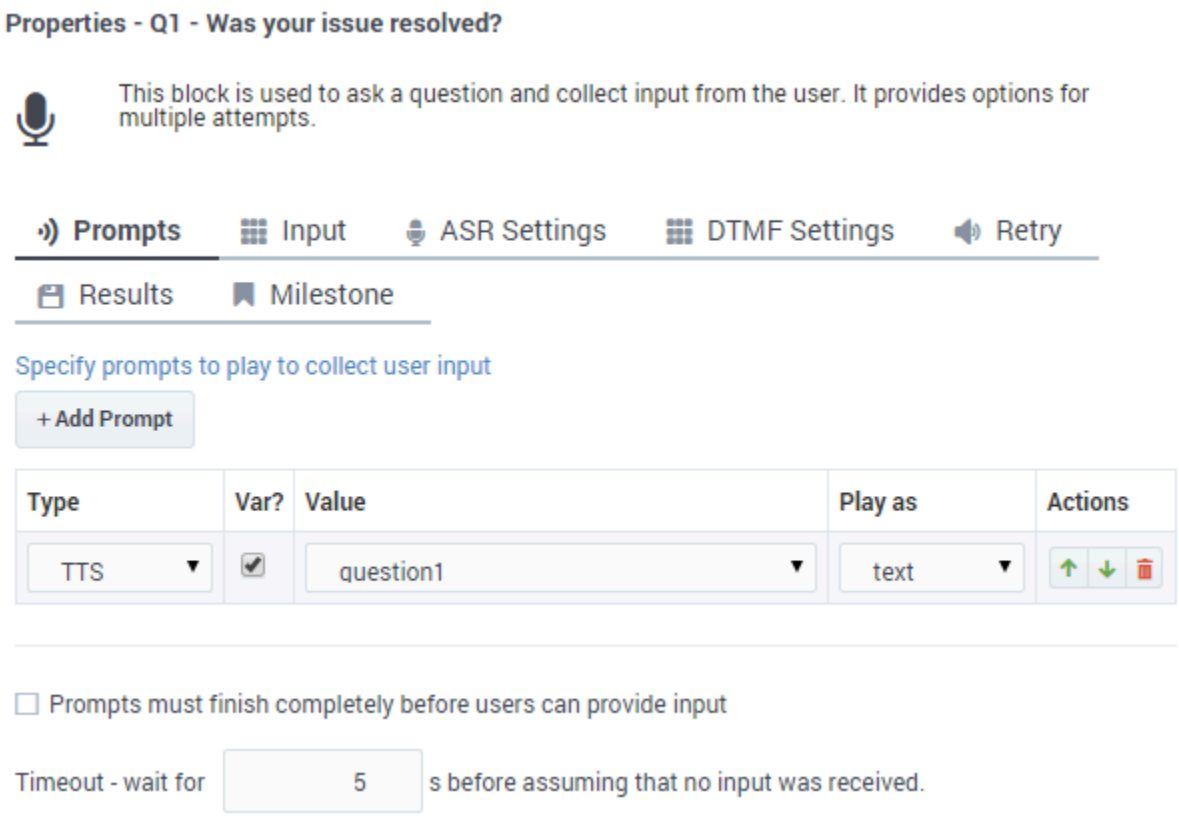
Survey answer variables must use the following naming convention:

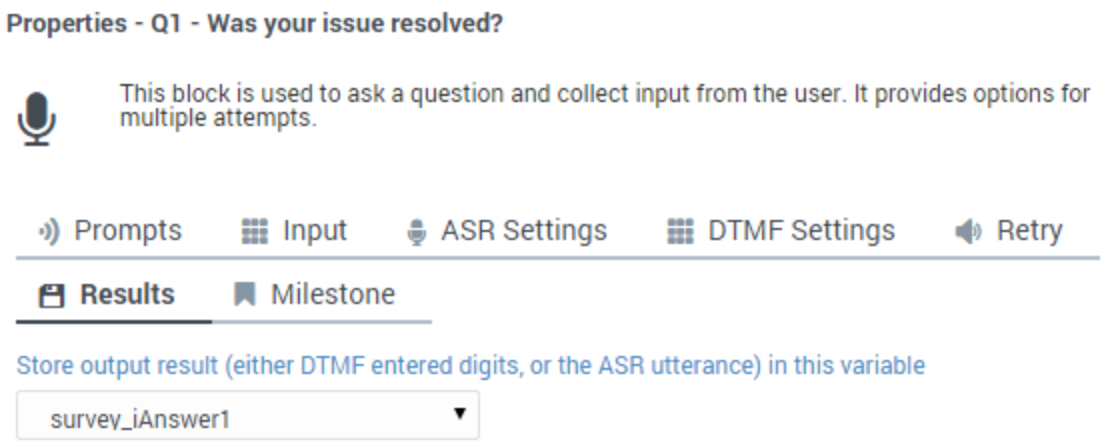
- The name must have the prefix `survey_`.
- The next character must indicate the data type (for example, `i` for integer or `s` for string).
- Example: `survey_iAnswer`.

Next, we add a series of User Input blocks and Milestone blocks to the **Self Service** phase. The **User Input** block asks the survey question and the **Milestone** block reports the survey answer.

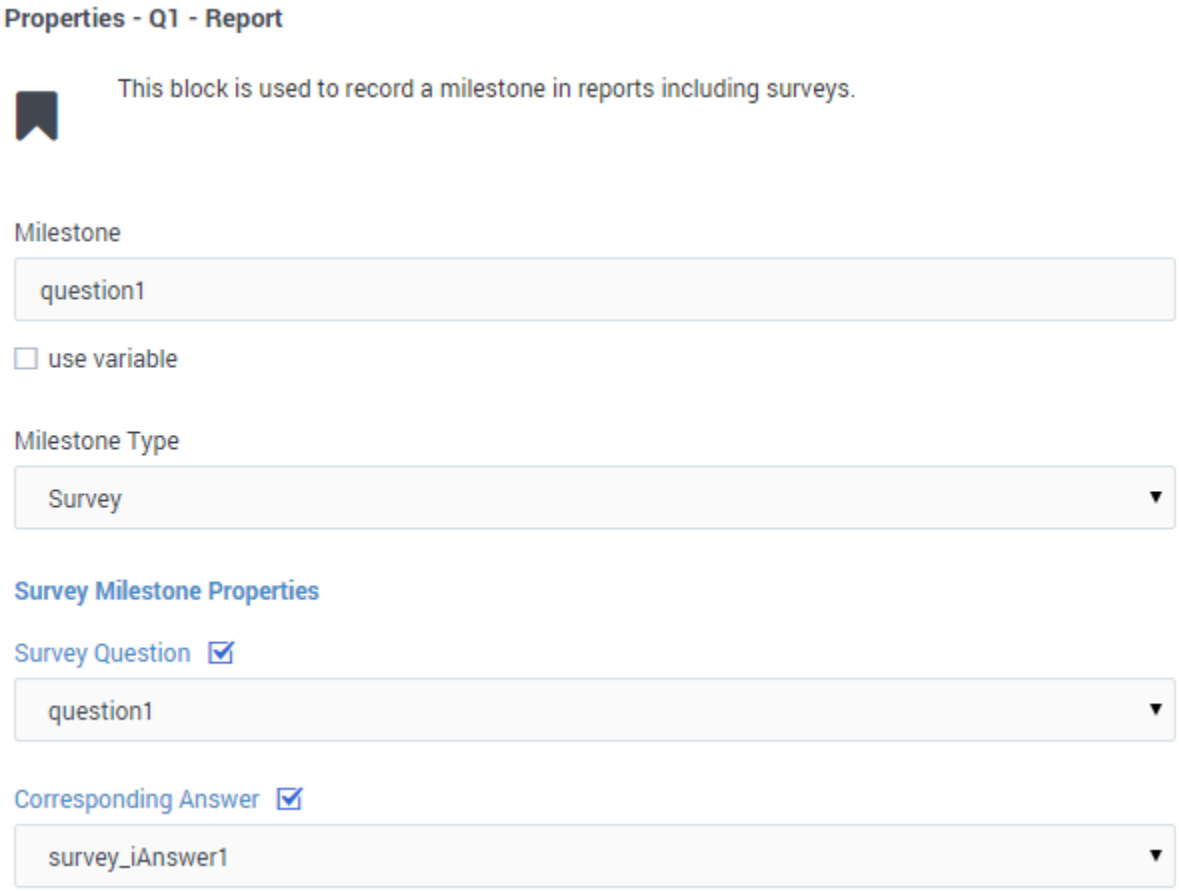


In each **User Input** block, select the question variable in the **Prompts** tab and answer variable in the **Results** tab.

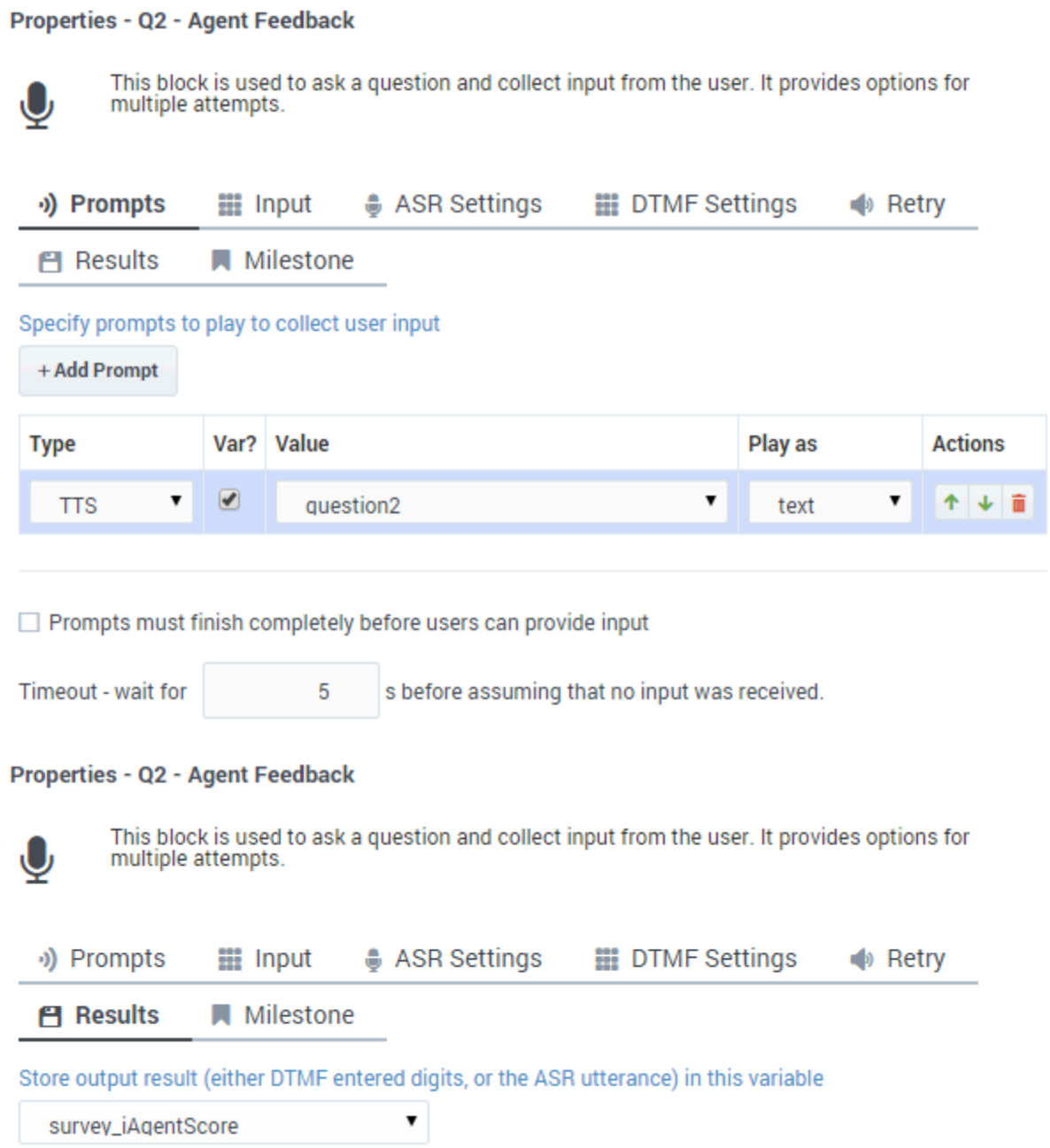


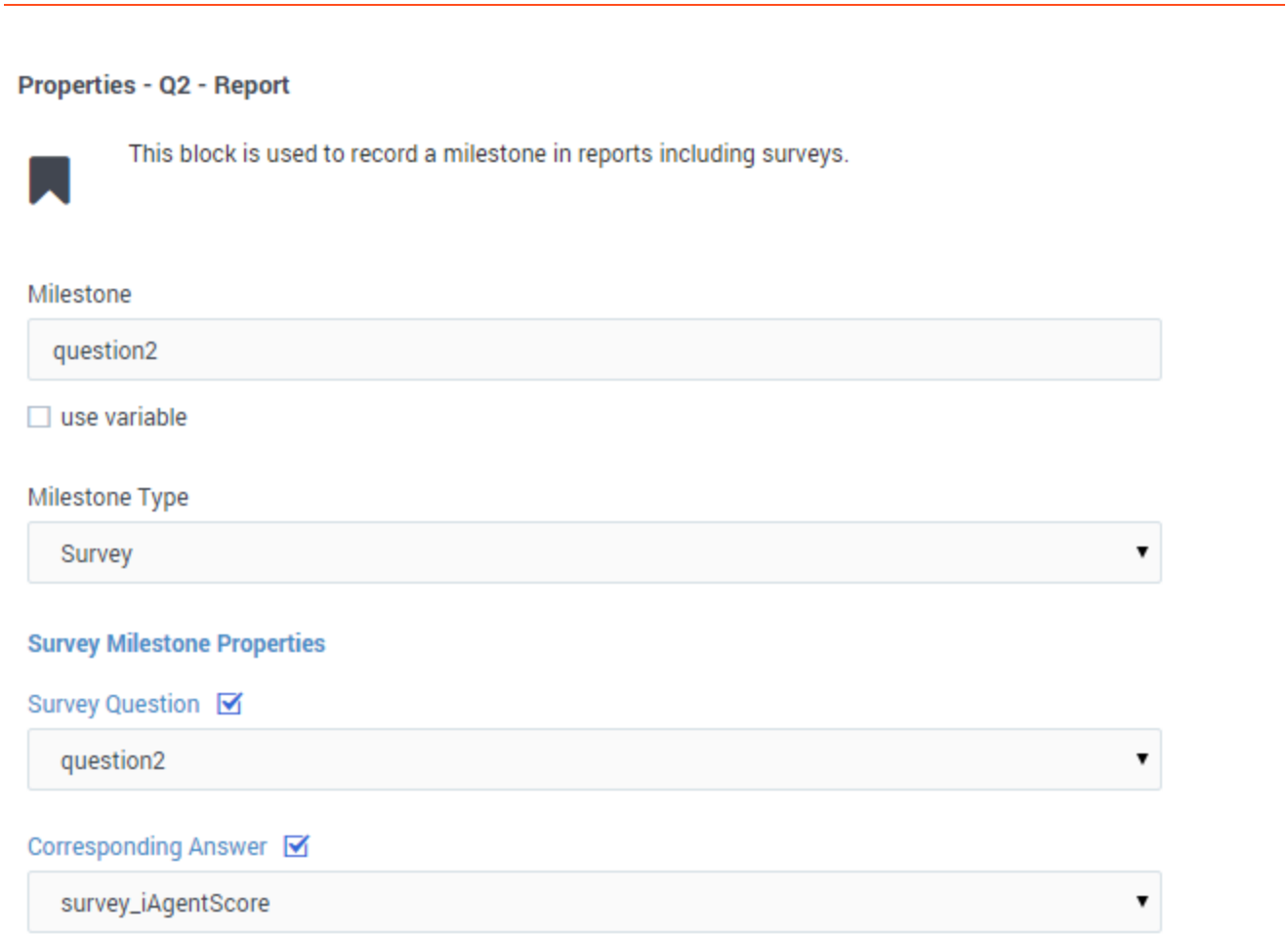


In each **Milestone** block, select the question and answer to send to reporting.



The following graphics show the process for survey question two, using the standard answer variable **survey_iAgentScore**.


Properties - Q2 - Agent Feedback
This block is used to ask a question and collect input from the user. It provides options for multiple attempts.
Prompts
Input
ASR Settings
DTMF Settings
Retry
Results
Milestone
Specify prompts to play to collect user input
+ Add Prompt
Type
Var?
Value
Play as
Actions
TTS
question2
text
Prompts must finish completely before users can provide input
Timeout - wait for
5
s before assuming that no input was received.
Properties - Q2 - Agent Feedback
This block is used to ask a question and collect input from the user. It provides options for multiple attempts.
Prompts
Input
ASR Settings
DTMF Settings
Retry
Results
Milestone
Store output result (either DTMF entered digits, or the ASR utterance) in this variable
survey_iAgentScore


Properties - Q2 - Report
This block is used to record a milestone in reports including surveys.
Milestone
question2
use variable
Milestone Type
Survey
Survey Milestone Properties
Survey Question
question2
Corresponding Answer
survey_iAgentScore