Amazon Connect Integration

WEEK 7 – CASES

PROPRIETARY & CONFIDENTIAL

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Amazon Connect – Cases

Amazon Connect Cases

Amazon Connect Cases enables your customer service organization to track, collaborate, and resolve customer cases.

A case represents a customer's issue. It is created to record the customer's issue, the steps and interactions taken to resolve the customer's issue, and the outcome.

Without doing any integration work, you can enable Cases for your contact center. You can set up cases to be created when contacts come in, and collect information from the customer to display on the case. Alternatively, agents can manually create cases. When an agent accepts a contact, they have context about an issue and can immediately start solving it. You can create tasks to track and route follow up steps to resolve the case.

https://docs.aws.amazon.com/connect/latest/adminguide/cases.html

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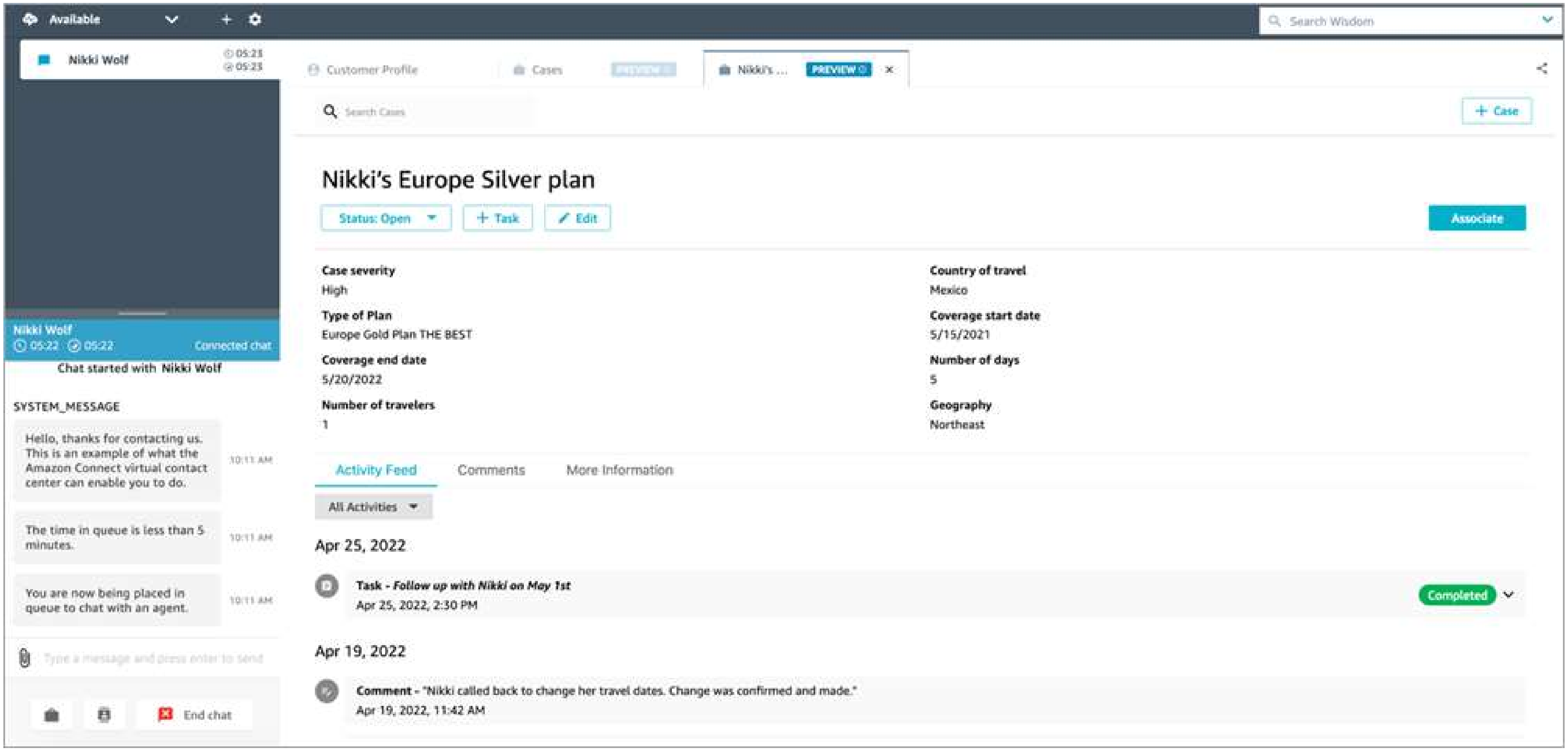
The following image shows an example case as it appears in the agent application.



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Getting started with Cases

AWS recommends reviewing the topics below to help you get started:

- Enable Cases
- Assign permissions
- Create case fields and case templates
- How agents use Cases
- Cases block
- Case event streams
- Cases quotas

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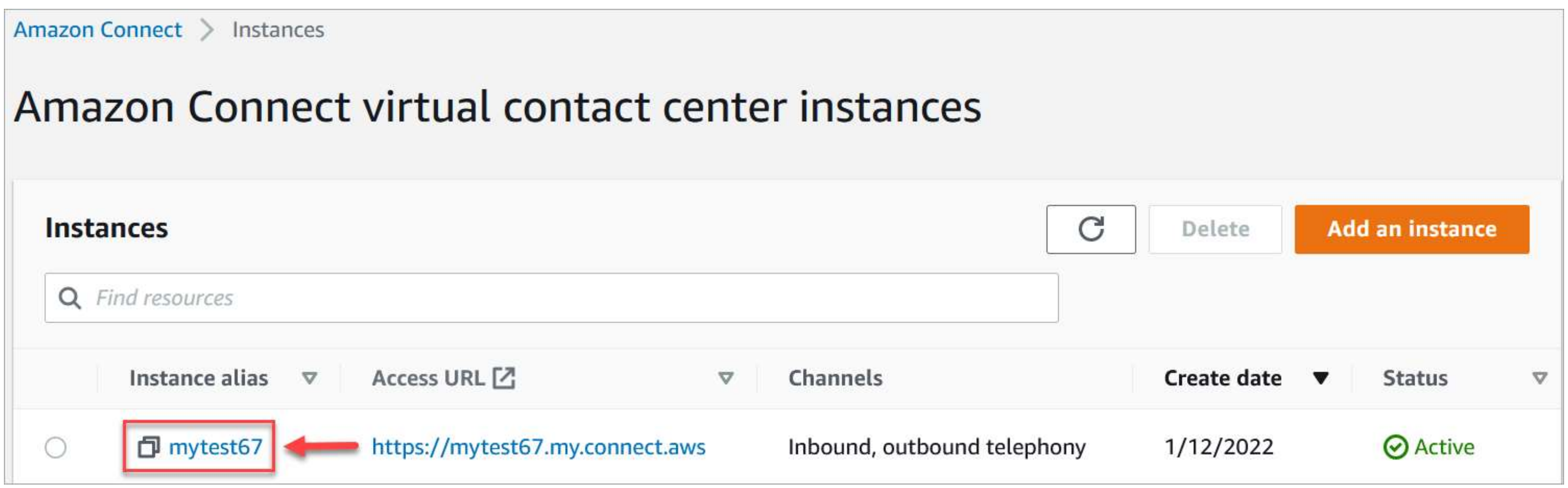
Enable Cases

Tip - A case is always associated with a customer profile. You must have Customer Profiles enabled. Check your instance settings in the Amazon Connect console, and if a Customer Profiles domain does not yet exist, Enable Customer Profiles for your instance.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.



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Enable Cases

3. In the navigation pane, choose Cases. This option is currently available in the US East (N. Virginia) and US West (Oregon) Regions.

4. Choose Enable cases to get started.

5. On the Cases page, choose Add domain.

6. On the Add domain page, enter a unique, friendly name that's meaningful to you, such as your organization name.

7. Choose Add domain. The domain is created.

If the domain is not created, choose Try again. If that doesn't work, contact AWS Support.

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Next steps

After your cases domain is created, do the following:

1. Assign security profile permissions to agents and call center managers.
2. Create case fields. Fields are the building blocks of your case templates.
3. Create case templates. Case templates are forms that agents complete and reference in the agent application. Templates ensure the right information is collected and referenced for different types of customer issues.
4. Optionally, add the Cases block to your flows. This block enables you to get, update, or create cases automatically.
5. Optionally, set up case event streams to get near real-time updates when cases are created or modified.

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Security profile permissions for Cases

The following image shows the security permissions used to manage access to Amazon Connect Cases functionality:

Cases

Type	All	View	Edit	Create
Cases	✓	✓	✓	✓
Case Fields	✓	✓	✓	✓
Case Templates	✓	✓	✓	✓

Amazon Connect – Cases

Security profile permissions for Cases

Also, to use Amazon Connect Cases, your users also need permissions to Customer Profiles permissions.

Customer Profiles

Type	All	View	Create	Edit
Customer profiles	✓	✓	✓	✓

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Assign the following permissions to manage who can create, view, and edit cases, case fields, and case templates:

- **Cases:** Manage who can access cases by using the agent application.
- **View case:** Allows the user to view and search cases in the agent application. This includes viewing case data (for example, status, title, summary), contact history (for example, calls, chats, tasks with information such as start time, end time, duration, etc.), and comments.
- **Edit case**: Allows the user to edit cases, which includes editing case data (for example, update case status), add comments, and associate contacts to cases.
- **Create case**: Allows the user to create new cases, and associate contacts to cases.

Amazon Connect – Cases

Assign the following permissions to manage who can create, view, and edit cases, case fields, and case templates:

- **Case Fields**: Manage who can configure case fields by using the Amazon Connect console.
- **View Case Fields**: Allows users to view the case fields page and all of the existing case fields (could be system or custom).
- **Edit Case Fields**: Allows users to edit any of the case fields (for example, change title, description, single-select options).
- **Create Case Fields**: Allows users to create new case fields.

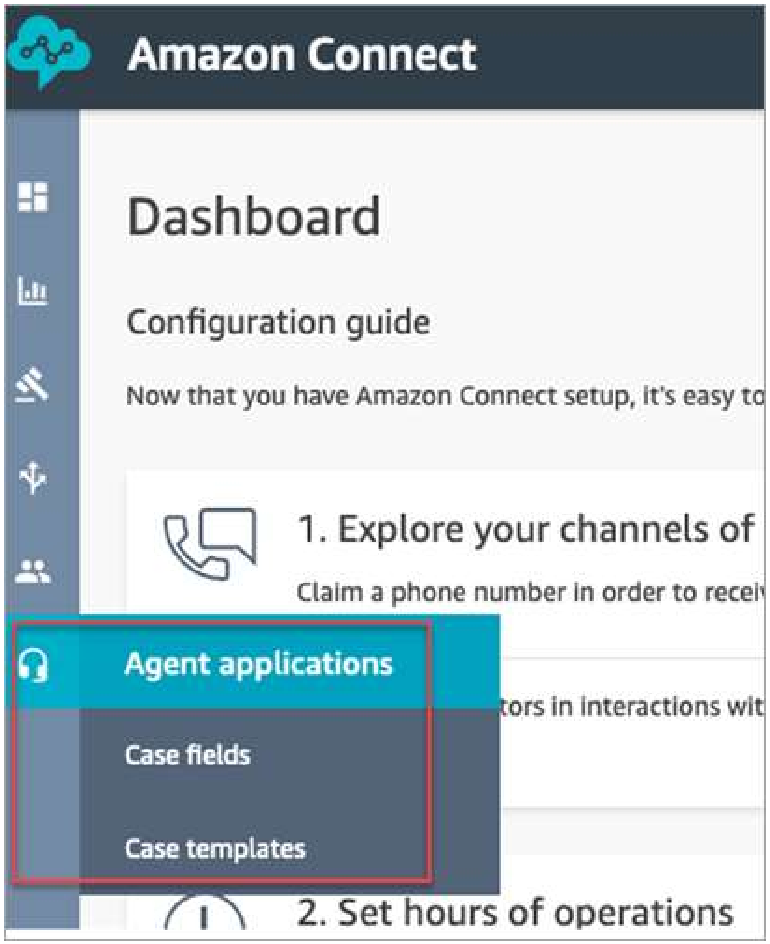
Amazon Connect – Cases

Assign the following permissions to manage who can create, view, and edit cases, case fields, and case templates:

- **Case Templates:** Manage who can configure case templates by using the Amazon Connect console.
- **View Case Fields**: Allows users to view the case fields page and all of the existing case fields (could be system or custom).
- **Edit Case Fields**: Allows users to edit any of the case fields (for example, change title, description, single-select options).
- **Create Case Fields**: Allows users to create new case fields.

Amazon Connect – Cases

When users have permissions to View Case Fields and View Case Templates, they will see the Case fields and Case templates options in their left navigation menu, as shown in the following image:



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Create case fields

Case fields are the building blocks for case templates. You create all of the possible fields of information (for example, VIN number, policy number, make/model of car) that you want agents to collect for a given customer issue.

After you create case fields, you can create case templates.

There are two types of case fields:

- **System case fields**: Amazon Connect provides system fields. You cannot change the name or description.
- **Custom case fields**: You can create custom case fields that are specific for your business. You must name the case field, and optionally provide a description. Note that the description appears only in the Amazon Connect console. It doesn't appear to agents.

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How to create case fields

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create fields.

2. Verify the quota for case fields and request an increase if needed

3. In the left navigation bar, choose **Agent applications, Case fields**.

4. The first time you create new fields, you'll notice several system fields are already present. You cannot change the name of these fields, but in some cases you can edit them.

For example, Case Id is a system field. When a case is created, Amazon Connect adds a case ID automatically, and you cannot change it. Case reason is also a system field but you can edit it and enter reasons that are specific to your contact center.

Amazon Connect – Cases

How to create case fields

5. Choose + New field.

6. Select the type of field you want to create. For example, you might choose Text if you want agents to be able to enter free form notes.

7. Assign a name to the field. It will appear to agents in the agent application.

8. Optionally, provide a description. It will only appear to admins on the Amazon Connect console. It does not appear to agents in the agent application.

9. Choose Save.

10. When you're done adding fields, you're ready to create a template.

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System case fields

Amazon Connect provides system fields. You cannot change the name or description of a system field.

The following table lists the system case fields:

Field name	Field ID (how you call the field in the API)	Field type	Description	Where the data comes from
Case ID	case_id	text	Unique Identifier of the case in UUID format (for example, 689b0bea-aa29-4340-896d-4ca3ce9b6226)	Amazon Connect
Case Reason	case_reason	single-select	The reason for opening the case	Agent
Customer	customer_id	text	The API is a customer profile ID. On the **Cases: Fields** page, the customer's name is displayed.	Amazon Connect

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Date/Time Closed	last_closed_datetime	date-time	The date and time the case was last closed. It does not guarantee that a case is closed. If a case is reopened, this field contains the date/time stamp of the last time the status was changed to closed.	Amazon Connect
Date/Time Opened	created_datetime	date-time	The date and time the case was opened.	Amazon Connect
Date/Time Updated	last_updated_datetime	date-time	The date and time the case was last updated.	Amazon Connect

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Reference number	reference_number	text	A friendly number for the case in 8-digit numeric format. Reference numbers (unlike the Case ID) are not guaranteed to be unique. We recommend that you identify the customer and then collect the reference number to correctly find the right case.	Agent
Status	status	single-select	Current status of the case	Agent
Summary	summary	text	Summary of the case	Agent
Title	title	text	Title of the case	Agent

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Custom case fields

You can create custom case fields that are specific for your business. You must name the case field, and optionally provide a description. Note that the description appears only in the Amazon Connect console. It doesn't appear to agents.

You can create fields that are type: number, text, single-select, or true/false.

Single-select fields

For single-select case fields, whether system or custom, you can add value options that the field can take. For example, you can add options to the single-select system field Case reason such as General inquiry, Billing issue, or Product defect, that reflect the types of issues in your contact center.

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About the Status field

You can add options to the single-select Status field, such as Investigating or Escalated to manager. The field comes with two options, Open and Closed, which cannot be changed.

Active/inactive field options

Single-select case fields can be active or inactive.

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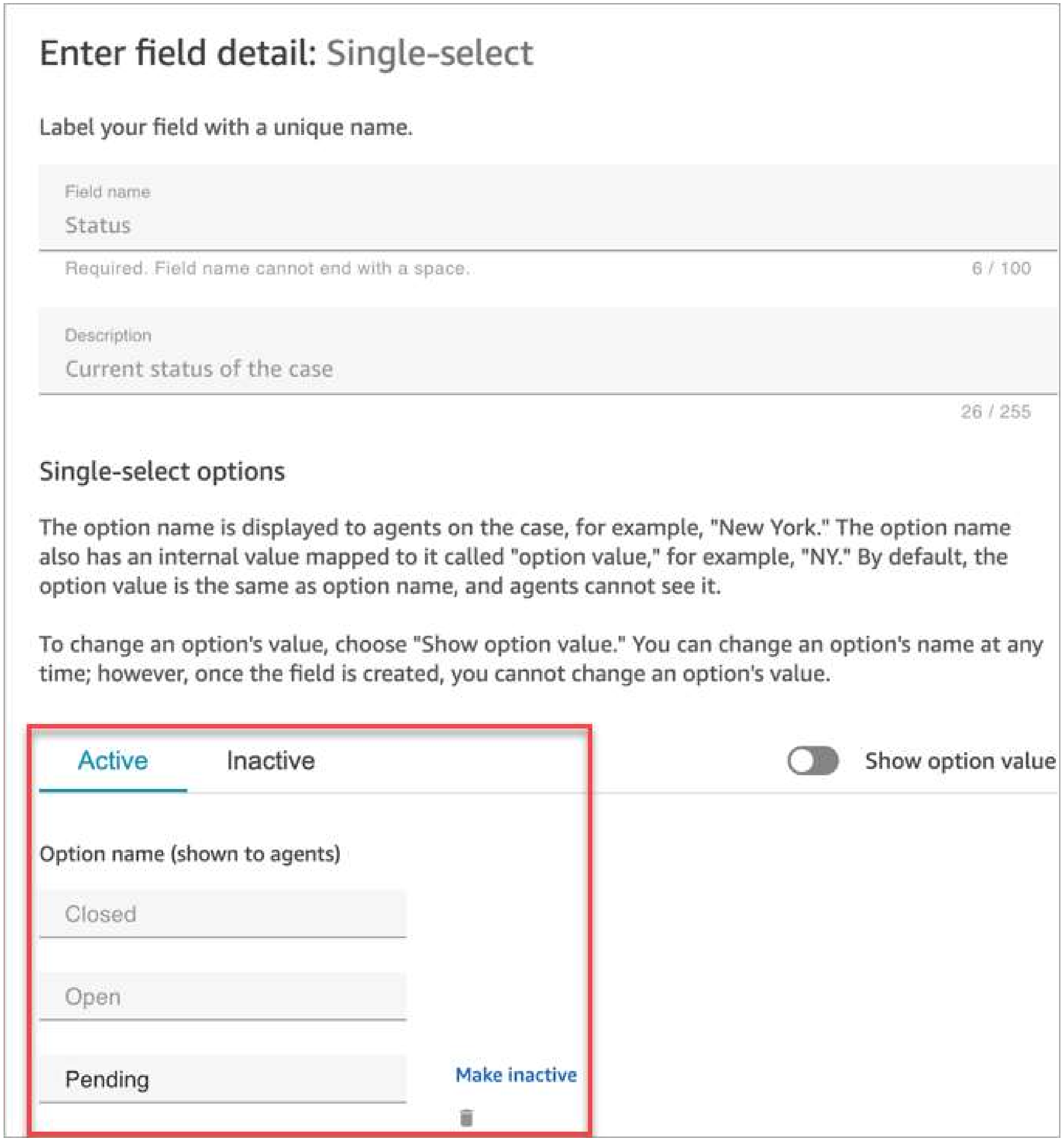

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- Active: If a field option is active, it means that the field can be given that option. For example, based on the following image, the Status field can be set to Closed, Open, or Pending, as these are the only active options.

- Inactive: If you make the Pending option inactive, then the field can no longer be given that option. Any existing cases remain unchanged and can still have the status as Pending.

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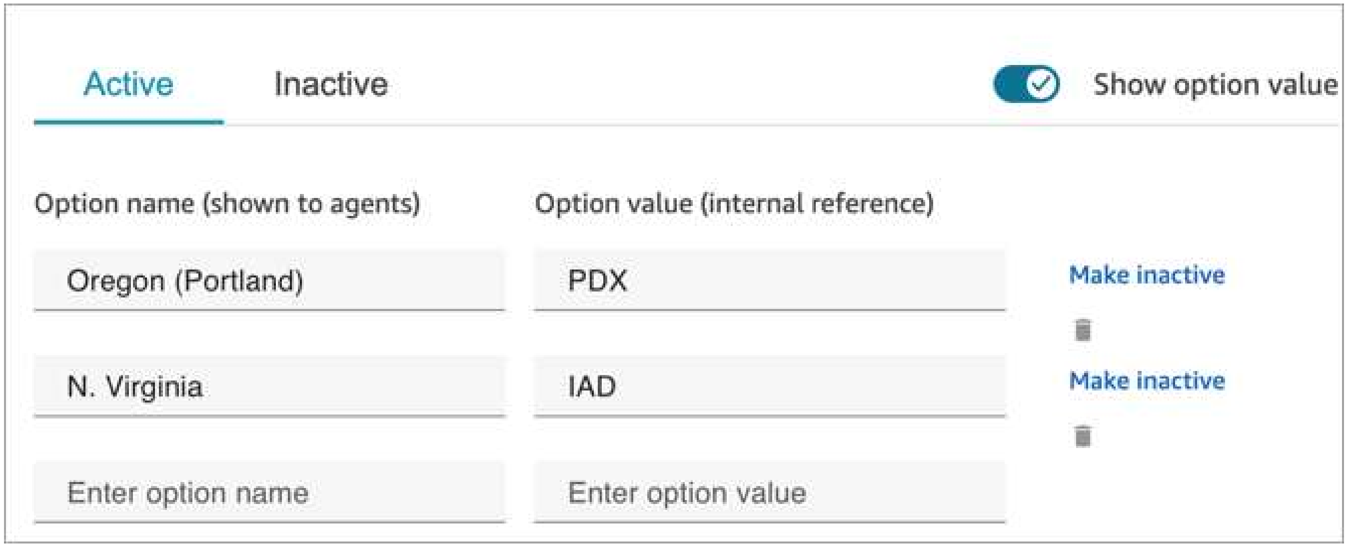
Single-select options have two parts:

1. Option name (shown to agents): The label that is displayed to agents in the agent application.

2. Option value (internal reference): The data that's collected. For example, for AWS Region, you may want to display US West (Oregon) but collect the data as PDX.

Field options appear to the agent in alphabetical order.



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Create case templates

Case templates are forms that ensure agents collect and reference the right information for different types of customer issues. For example, you can create a case template for vehicle damage issues, and require agents complete certain fields when they talk to a customer filing an insurance claim.

When you create a case template, you choose the name that appears to agents, the fields on the form, and the order of the fields.

Important - Cases are always created based on a template.

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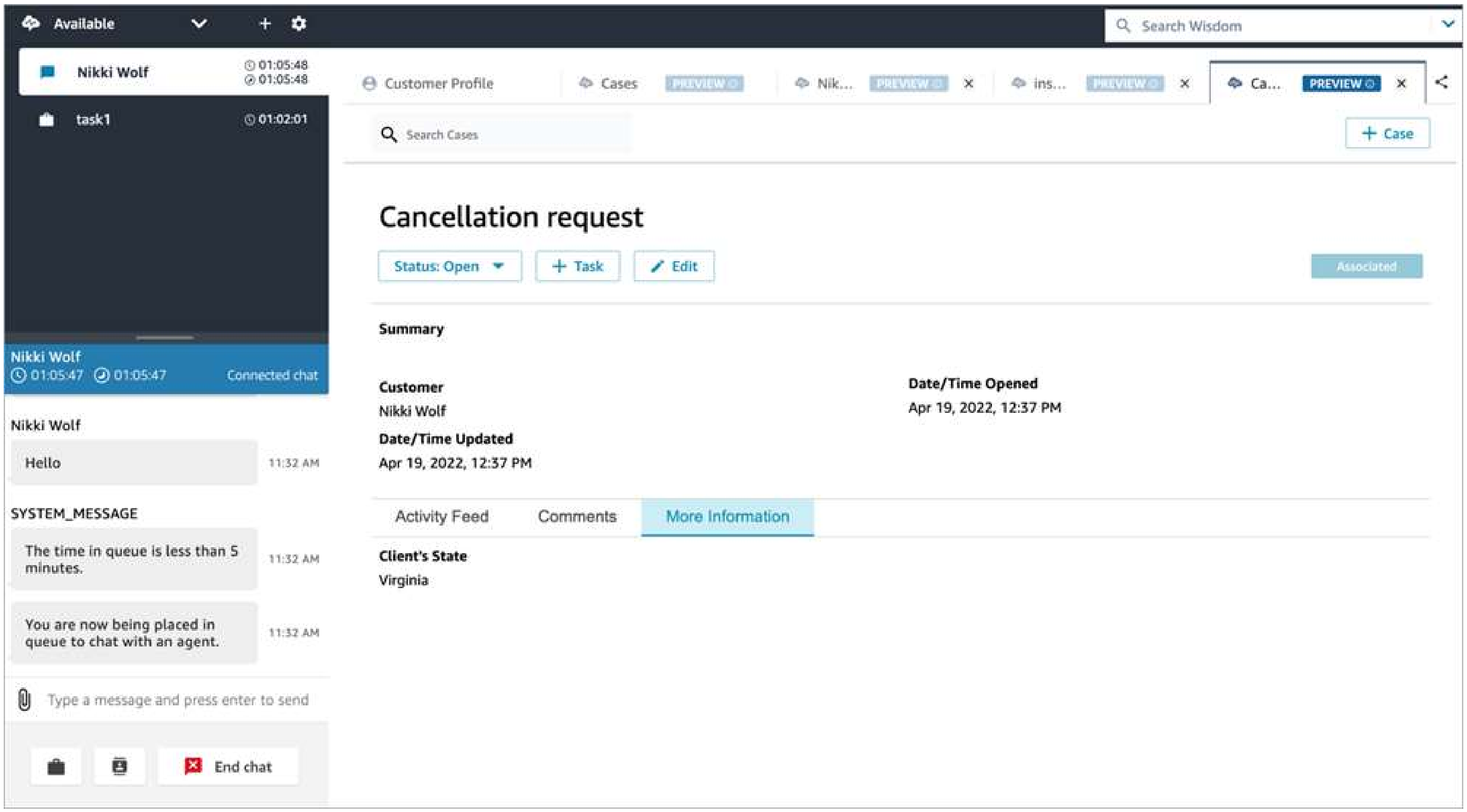
How case templates look in the agent application

In the agent application, the agent sees the case fields in a Z-formation: case fields are displayed in two columns from left to right, top to bottom.



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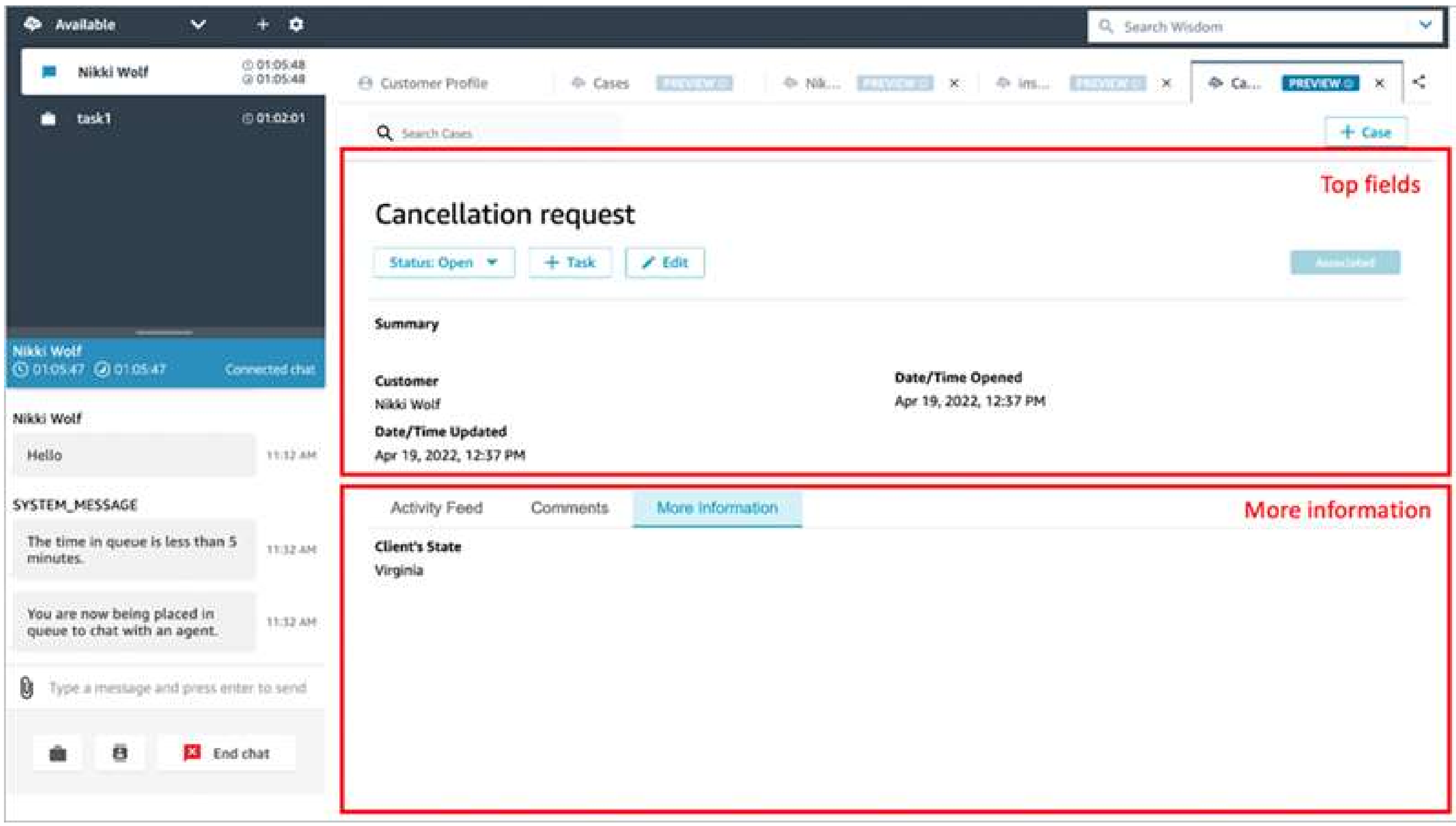
How case templates look in the agent application

When you're building a case template, think of the information in the agent application as being is divided into two sections where case fields are displayed to the agent:



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- Top fields: This section is always visible on the case, even when agent is viewing sub-sections of the case (for example, Activity Feed or Comments).

- More information: This is a tabbed subsection of the case. It is visible when agent is viewing another subsection, such as Activity Feed or Comments.

When you create and edit a template, you can do the following in each section:

- Change the order of the fields.
- Indicate if fields are required.

Some system fields, such as Title and Status, appear on all cases and are required. Other system fields, such as Customer, Summary, and Reference number, appear by default on the case details page. You can remove or rearrange these fields.

Each case that is created is connected to a customer profile from your Amazon Connect instance. On new case templates, the customer name appears by default on the case details page. You can remove or rearrange this field from your templates from the Amazon Connect console.

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How to create a template

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create templates. For a list of required permissions, see Security profile permissions for Cases (Preview).

2. Verify the quota for case templates and request an increase if needed. For more information, see Amazon Connect Cases service quotas (Preview).

3. Verify the case fields you want to add to your case template have already been created.

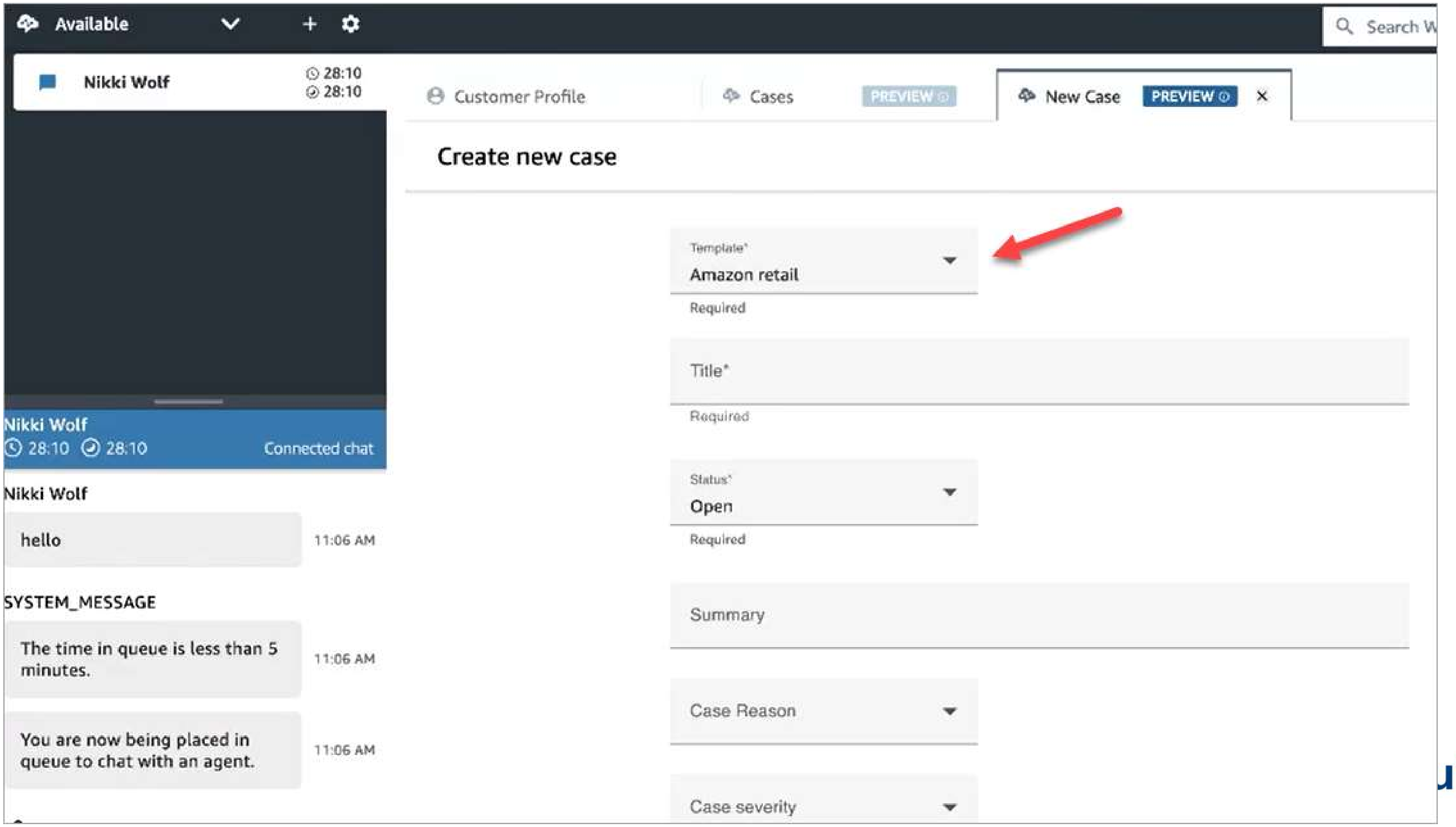
4. In the left navigation bar, choose Agent applications, Case templates.

5. Choose + New Template.

Amazon Connect – Cases

How to create a template

6. Assign a name to the template. It will appear to agents in the agent application. The following image shows an example of how templates appear, by default in alphabetical order:



Amazon Connect – Cases

How to create a template

7. In the Top fields section, you'll see some system fields already there. Choose Add fields, and use the dropdown to choose the field. Fields that are gray-out are already a part of the template. If you want agents to complete the field in order to save the form, choose Required.

8. In the More information section, choose the fields you want to appear.

9. When you're done, choose Publish. The template is immediately made available to agents in the agent application.

Amazon Connect – Cases

Case layouts

This topic is intended for developers who are using the Amazon Connect Cases APIs.

There is an underlying resource called a case layout that is linked to the case template. Technically, it is the case layout that holds the display elements for a case, such as:

- Which fields to display.
- The section, either Top panel or More information.
- The order within a section to display these fields

Whereas it's the case template that mandates a particular schema, such as required case fields.

The case layout is linked to a case template.

Note - You can create a case template and not link it to a case layout. Any case created with a case template that is not linked to a case layout will display system fields in a default order.

Amazon Connect – Cases

Access Cases in the agent application

After you enable Amazon Connect Cases, you need to take steps to make the functionality available through the agent application. This topic explains your options.

Tip - Make sure your agents have Cases permissions in their security profile so they can access Cases. For more information, see Security profile permissions for Cases

Amazon Connect – Cases

Option 1: Use Customer Profiles with the CCP out-of-the-box

Cases is already embedded alongside the Contact Control Panel (CCP). Your agents will access the CCP and Cases in the same browser window using a link that looks like this:

- https://instance name.my.connect.aws/agent-app-v2/

If you access your instance using the awsapps.com domain, use the following URL:

- https://instance name.awsapps.com/connect/agent-app-v2/

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Option 2: Embed Cases into a custom agent application

When you embed your Contact Control Panel (CCP), you have the option of showing or hiding the pre-built CCP user interface. For example, you may want to develop a custom agent application that has a user interface you design, with customized buttons to accept and reject calls. Or, you may want to embed the pre-built CCP that's included with Amazon Connect into another custom app.

Regardless of whether you display the pre-built CCP user interface, or hide it and build your own, you use the Amazon Connect Streams library to embed the CCP and Cases into the agent's application. This way, Amazon Connect Streams is initialized, and the agent can connect and authenticate to Amazon Connect, and Cases.

Tip - When you customize the agent's application, you determine what URL agents will use to access their agent application. This might be very different from the one provided by Amazon Connect. For example, your URL could be https://example-corp.com/agent-support-app.

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How agents use Cases

A case represents a customer's issue. A case is created to record the customer's issue, the steps and interactions taken to resolve the customer's issue, and the outcome.

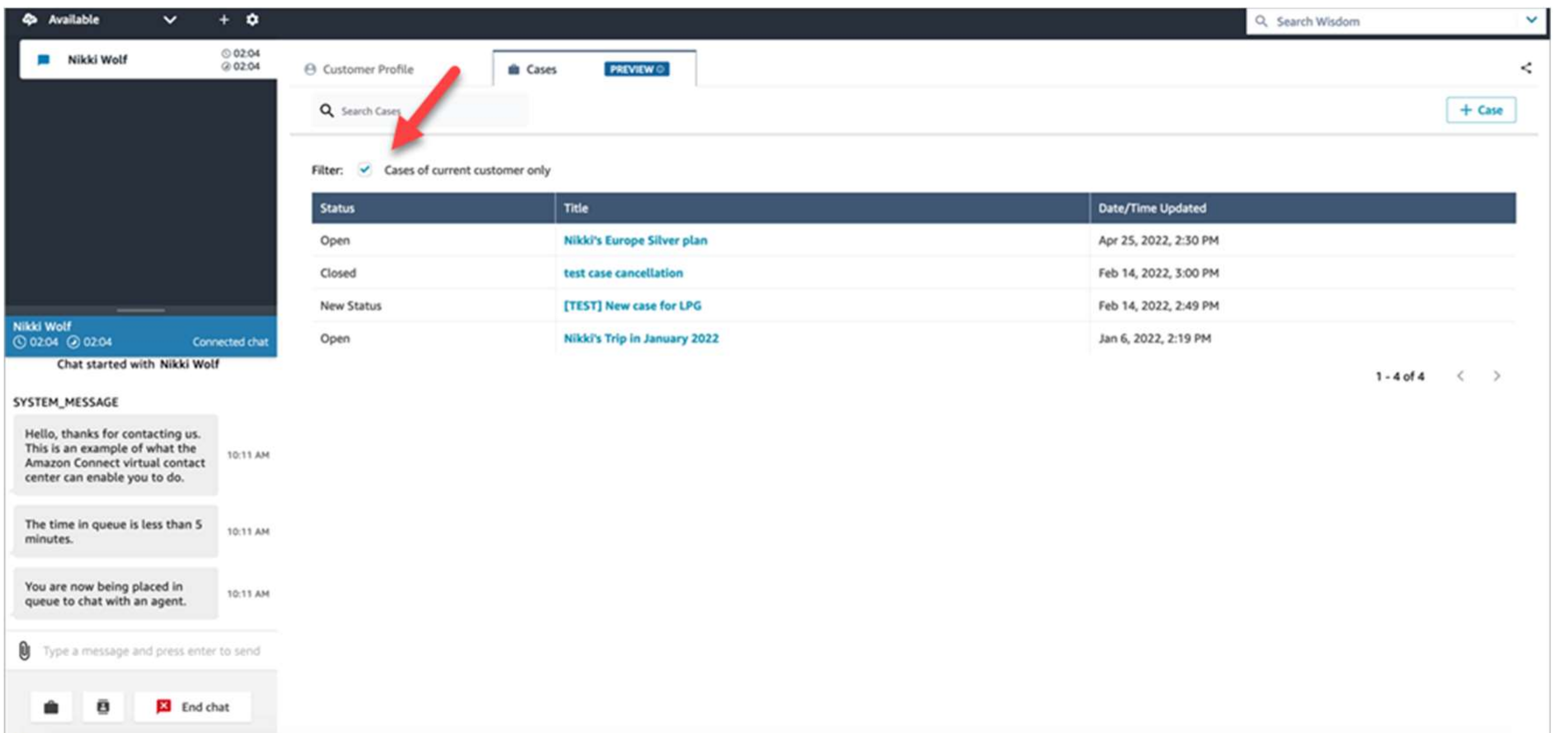
If you have permission to view cases then you will see the Cases tab in the Amazon Connect agent application. The following image shows an example Cases tab.

Amazon Connect – Cases

Search and view cases

You can search cases using a keyword match. Amazon Connect searches data across all system and custom fields. The results are sorted from most-recently to least-recently updated case.

If you are on a contact, and the contact has been associated to a customer profile, then search automatically filters to cases of current customer.



Amazon Connect – Cases

Search and view cases

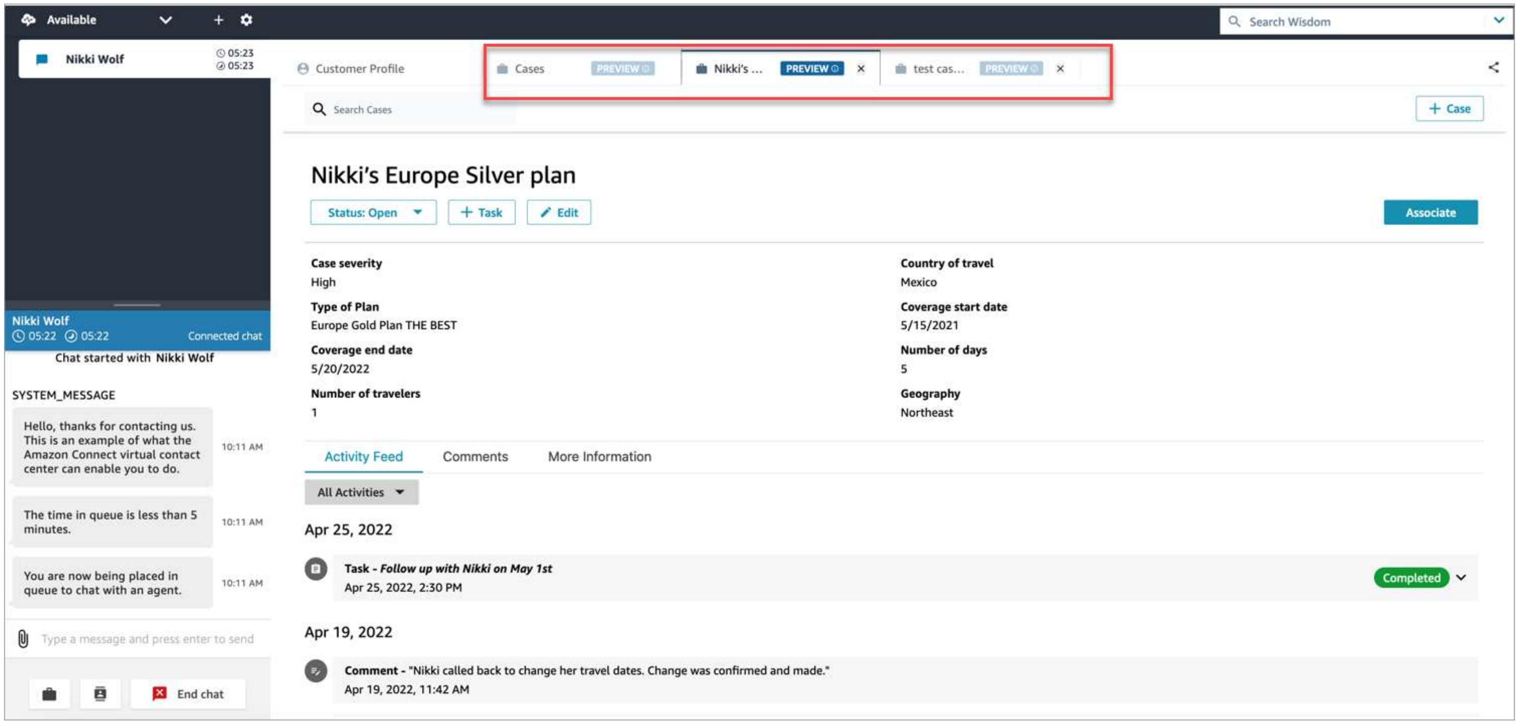
Regardless of whether you are on a contact, you have the option to do a general search. If you are on a contact and want to search beyond the current customer, clear the selection for **Cases of current customer only.**

Amazon Connect – Cases

View a case

When you select any of the cases in the search results to view the case, a new tab opens. This enables you to have multiple cases open at the same time.

If you add a Cases block to a flow, and configure it with Link contact to case enabled, then cases will open automatically when the agent accepts the contact.



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Activity feed

The activity feed shows calls, chats, tasks, and comments from the most recent to least recent Started data.

Contacts will have an indicator of Ongoing or Completed. If the contact was completed, there will a Completed/Terminated date/time and a link to Contact details that takes user directly to the Contact details page.

Only users that have access to this page will be able to see contact details for a given contact. Even within this page, there are more granular permissions so different users may see different information. Information might include: basic contact details/contact attachments, transcripts and recordings with Contact Lens categories, sentiment, and summaries, recordings, etc.

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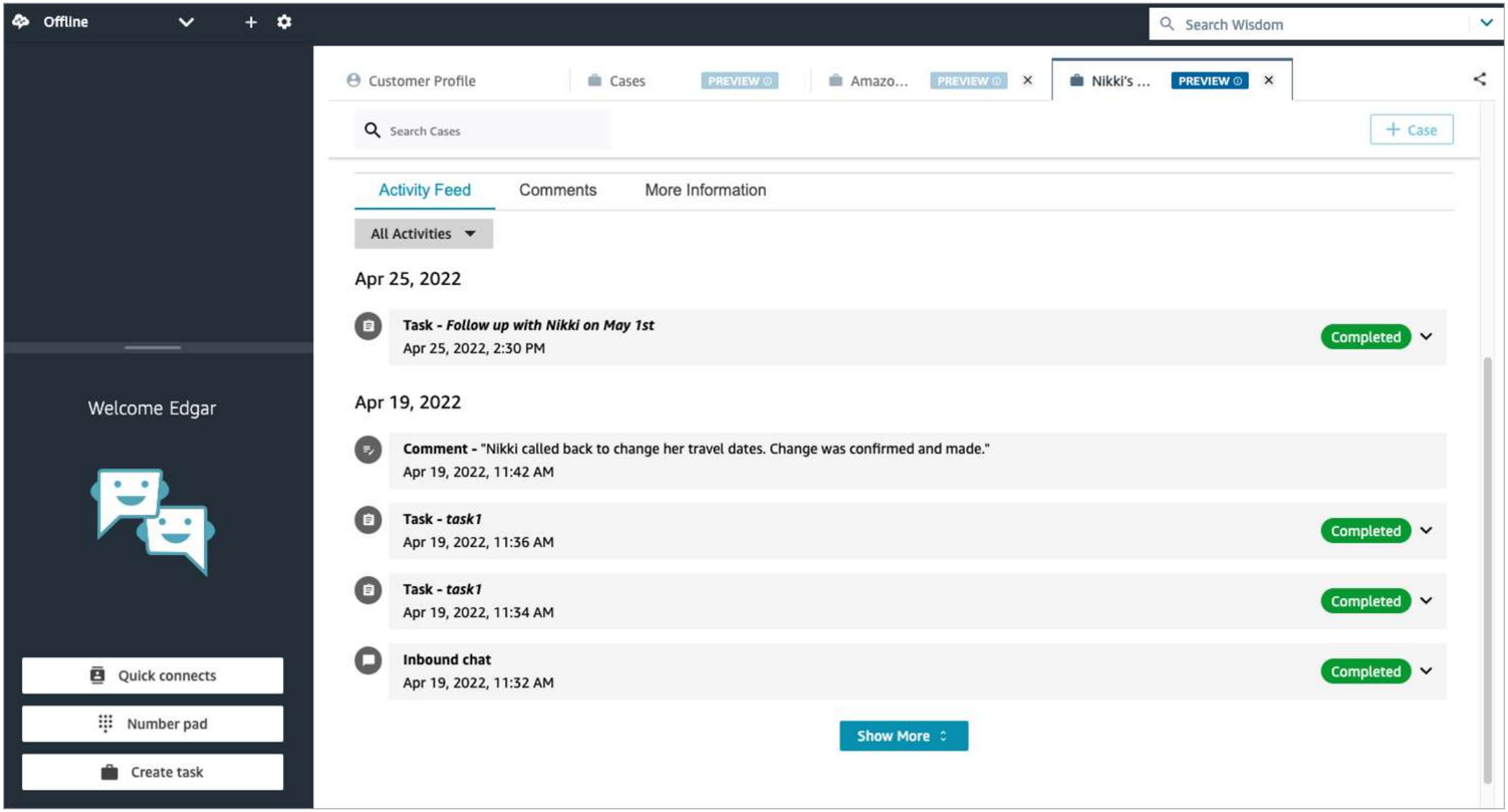
Activity feed



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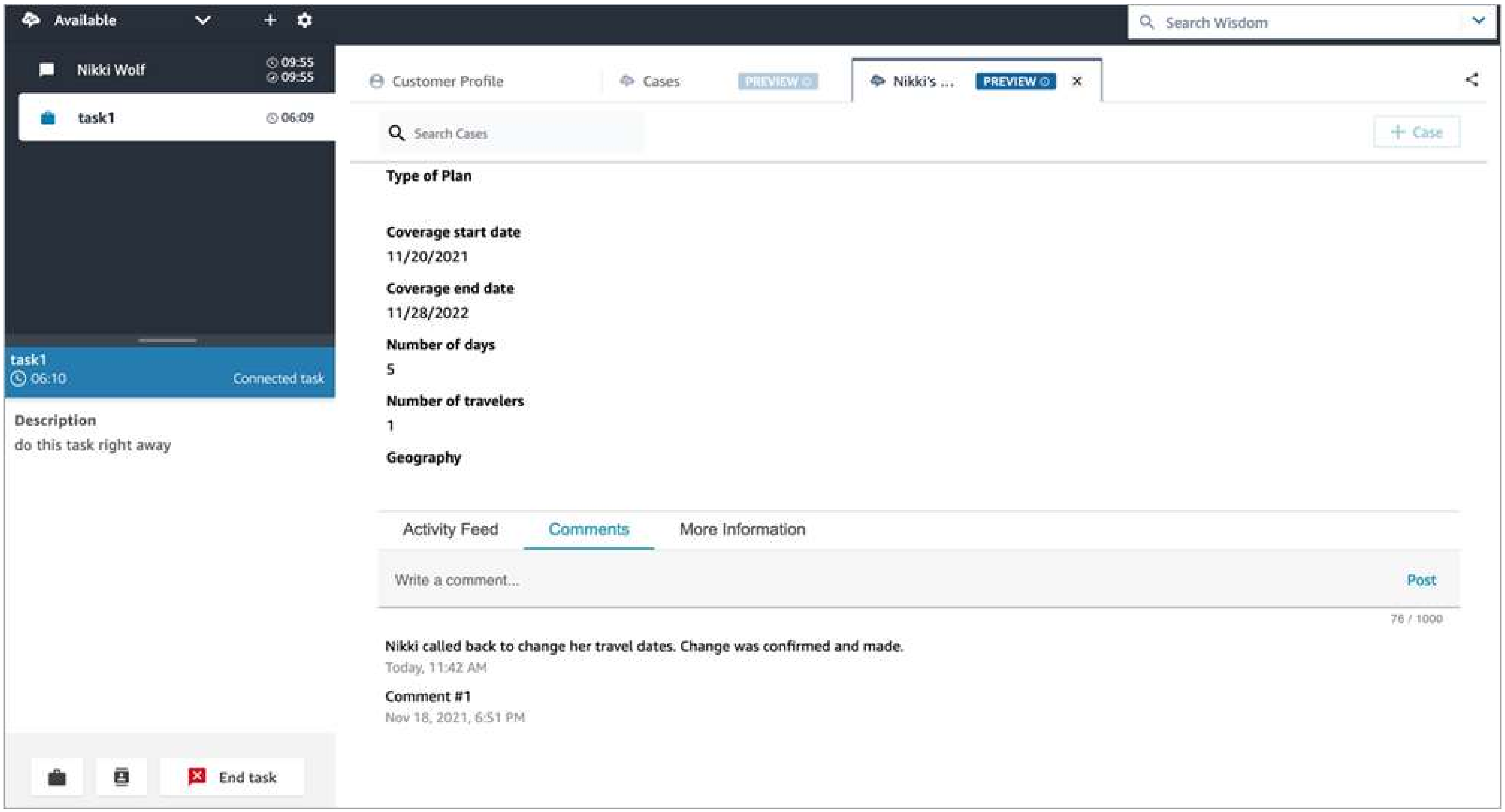
Comments

Agents have the ability to view and add comments.



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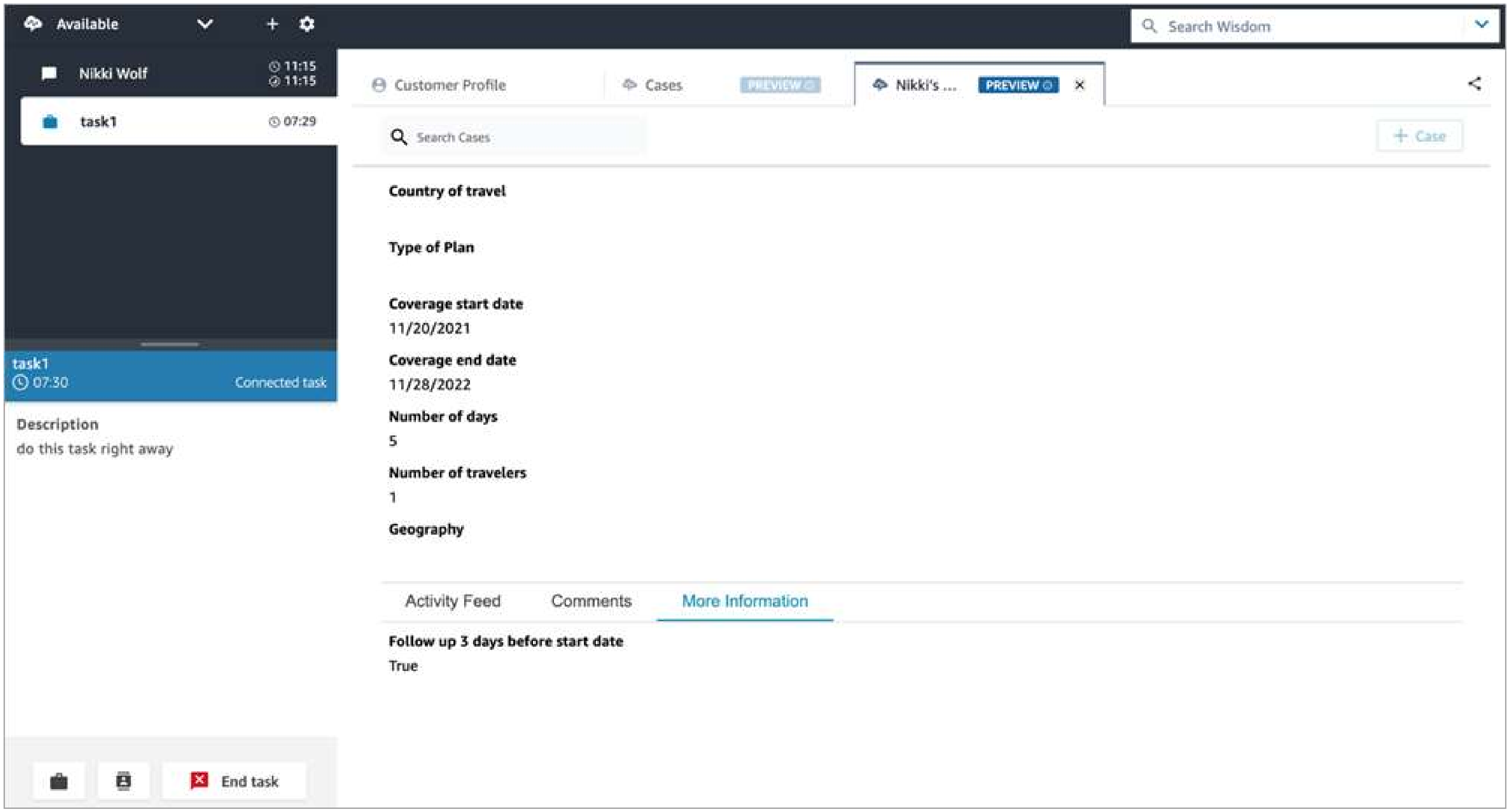
More information

There may be additional information for agents to view and populate on the More information tab, depending on the case template is designed.



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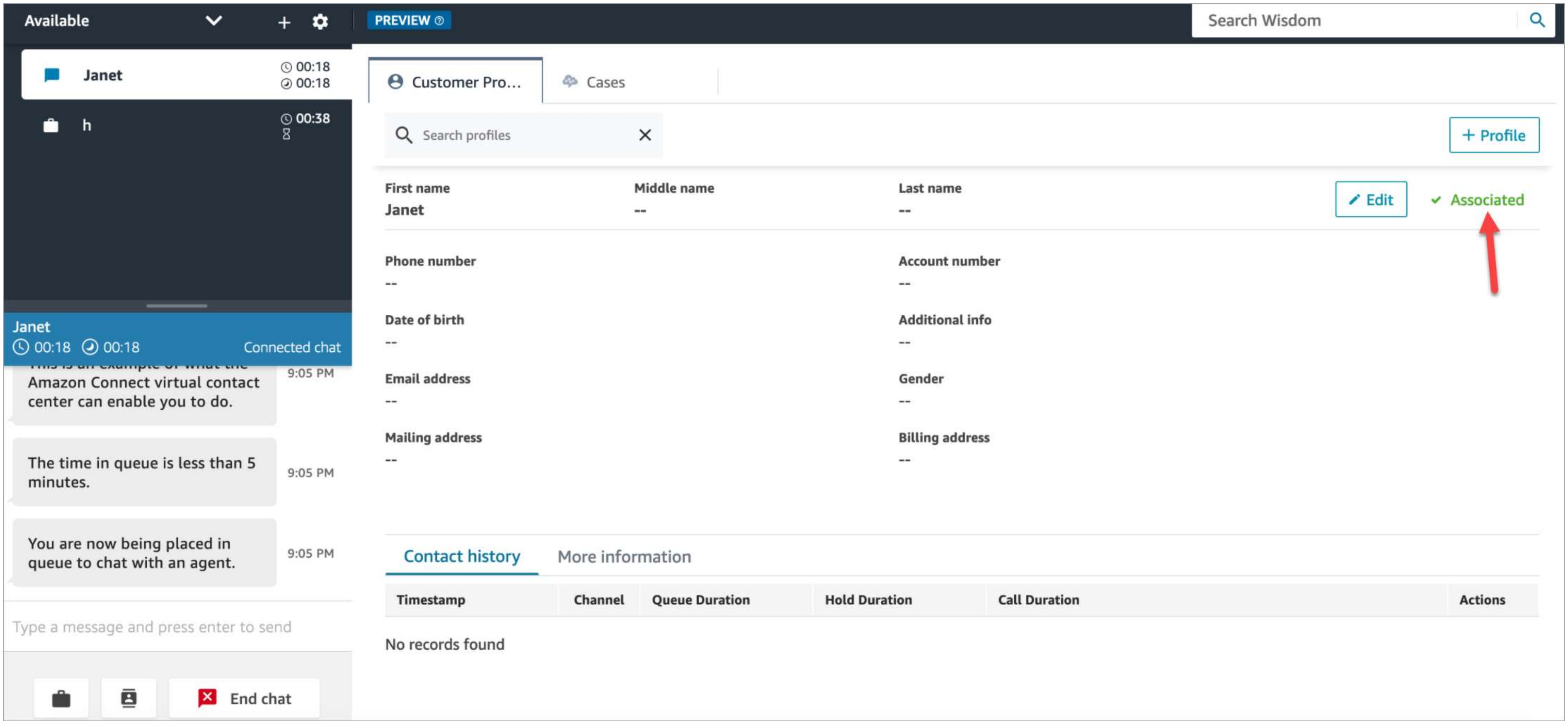
Create a case

To create a case, you must be on a contact (call, chat, or task) and have associated the contact with a customer profile, as shown in the following image.



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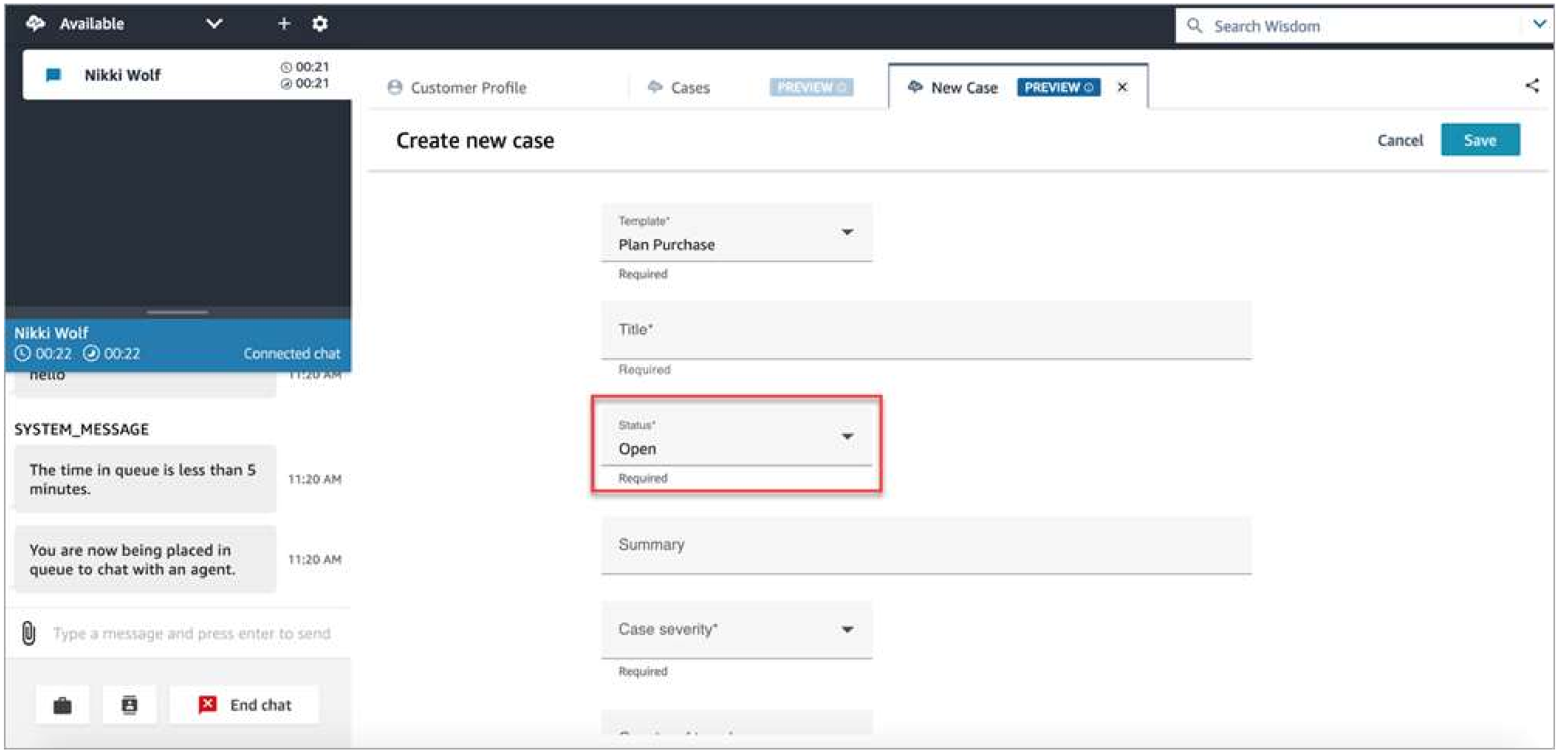
Create a case

For a case to be created:

- The Status must be Open.
- All required fields must be filled in.



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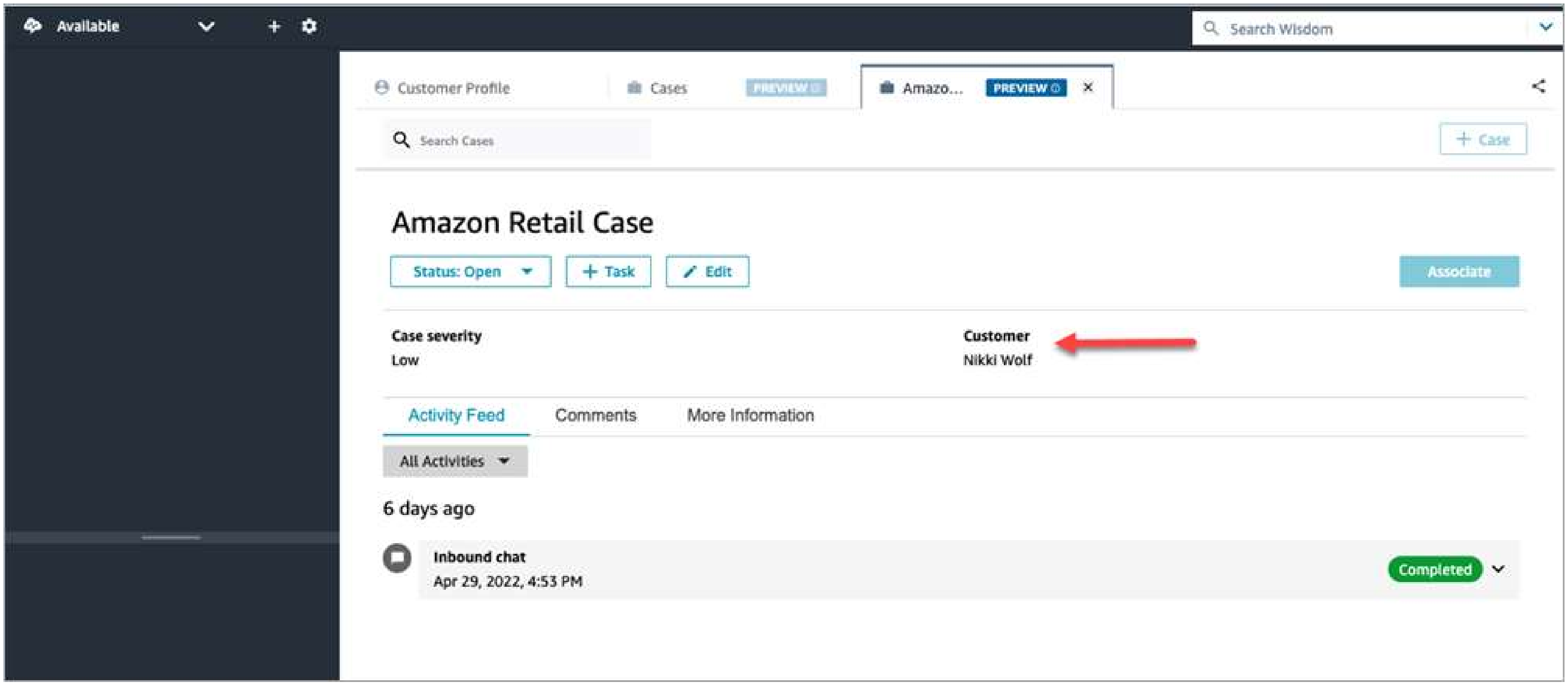
Customer name

Each case that is created is connected to a customer profile from your Amazon Connect instance. On new case templates, the "customer" name appears by default on the case details page. You can rearrange this field on your case template, or even remove it entirely.



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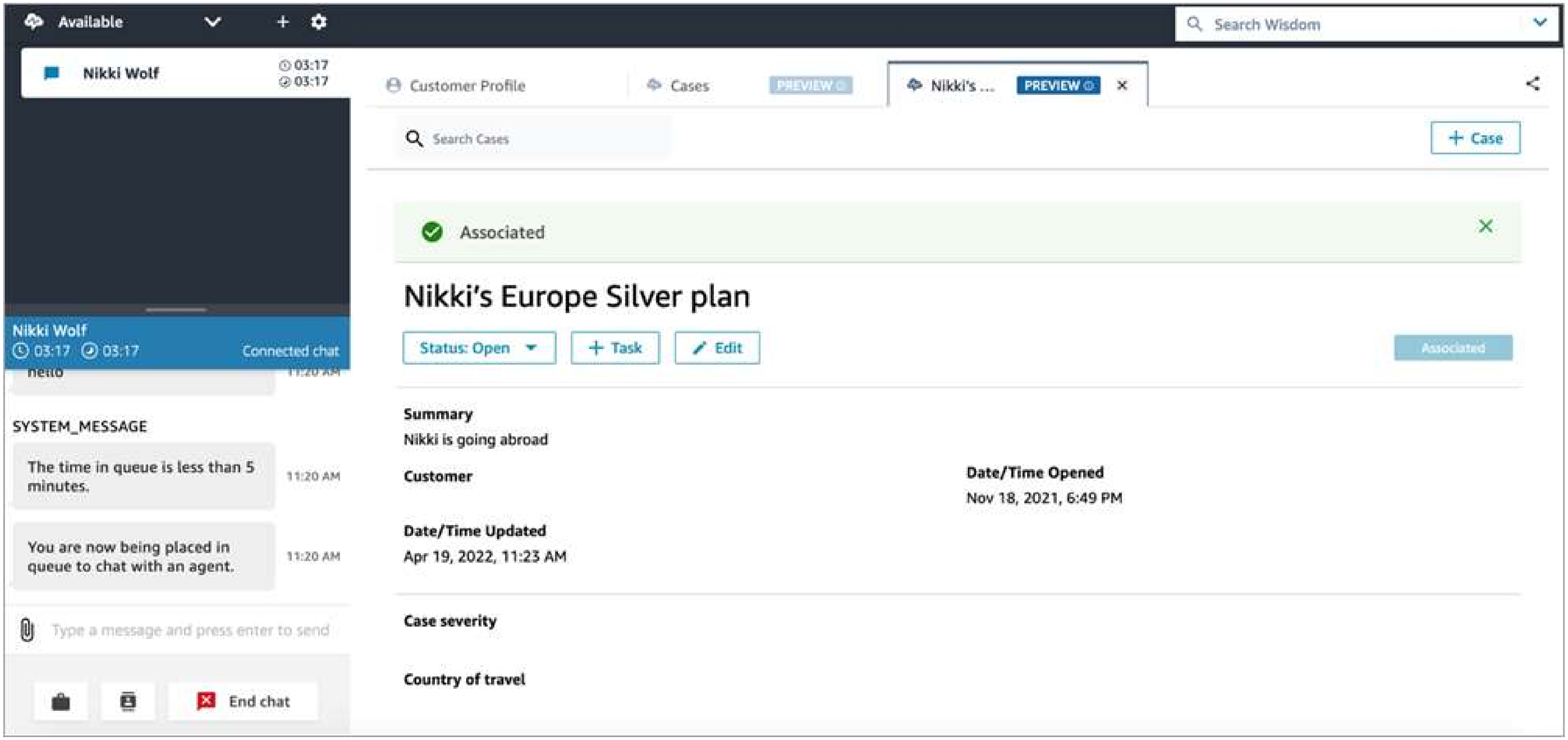
Associate a contact with a case

The agent can associate the contact to an existing case, such that the contact will appear on the activity feed of the case with indicator Ongoing.



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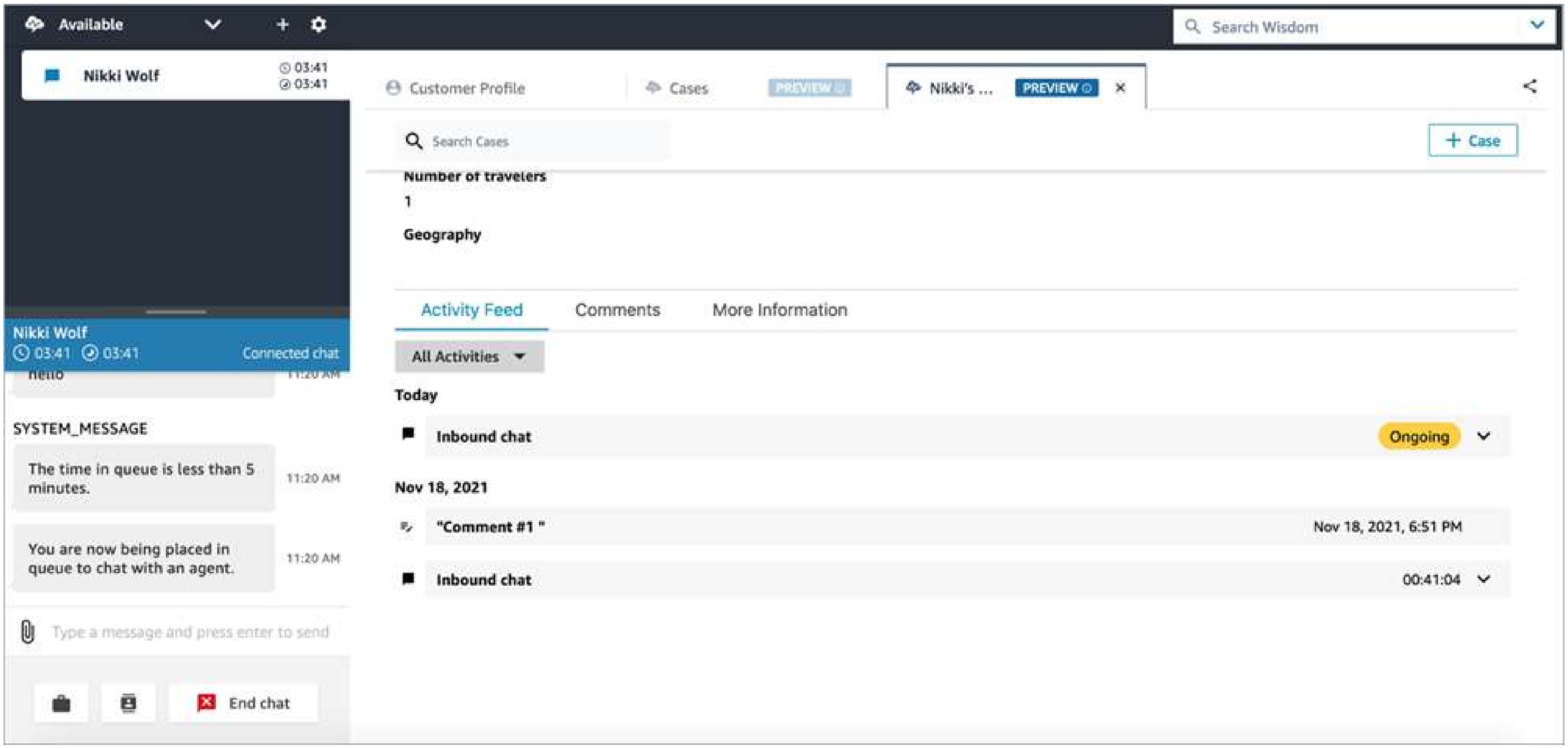

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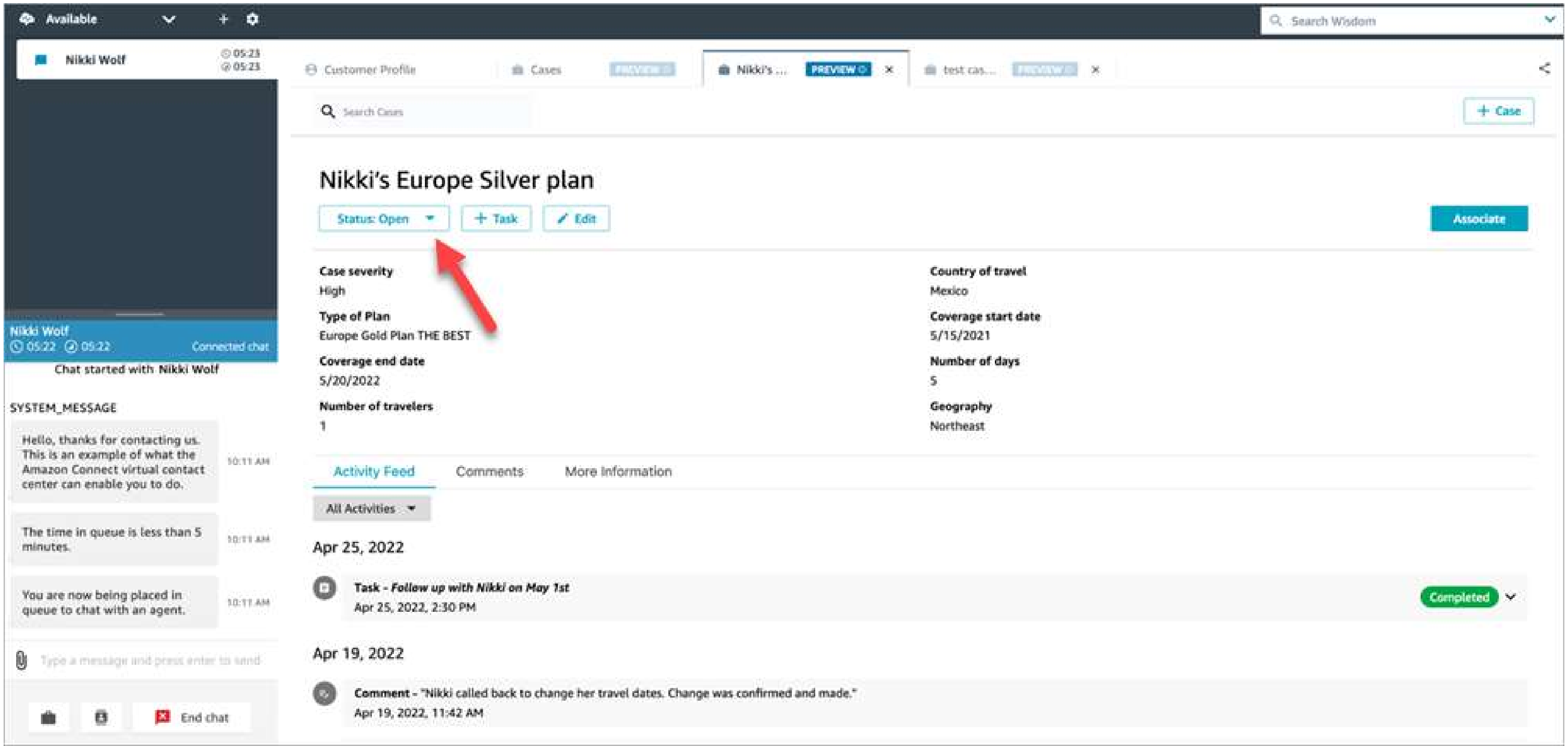
Edit a case

To edit a case, the agent chooses Edit and Save to save any changes.

You can edit a case only when it is not in a Closed status. If the case is Closed, you must update the status, then choose Edit to make your changes.



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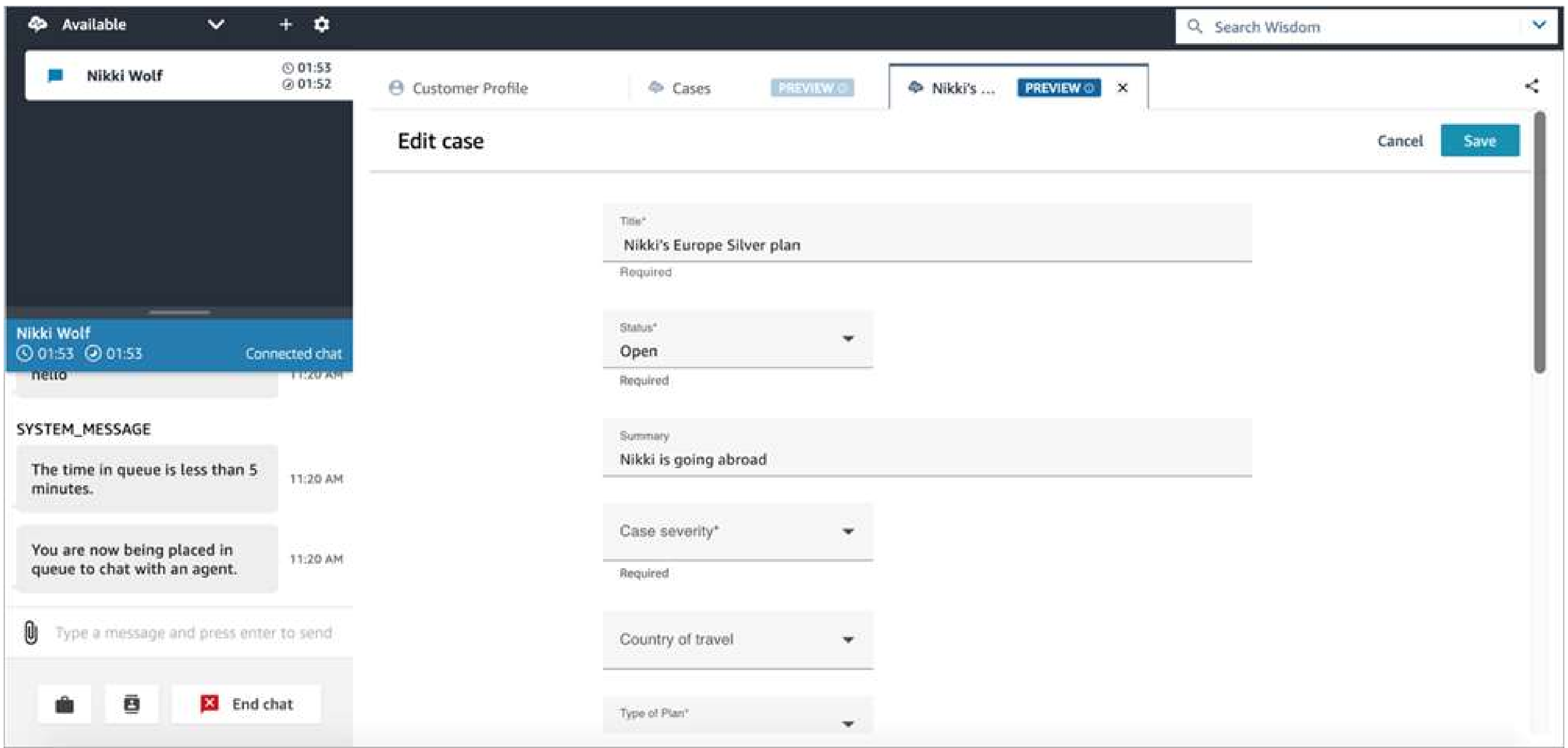

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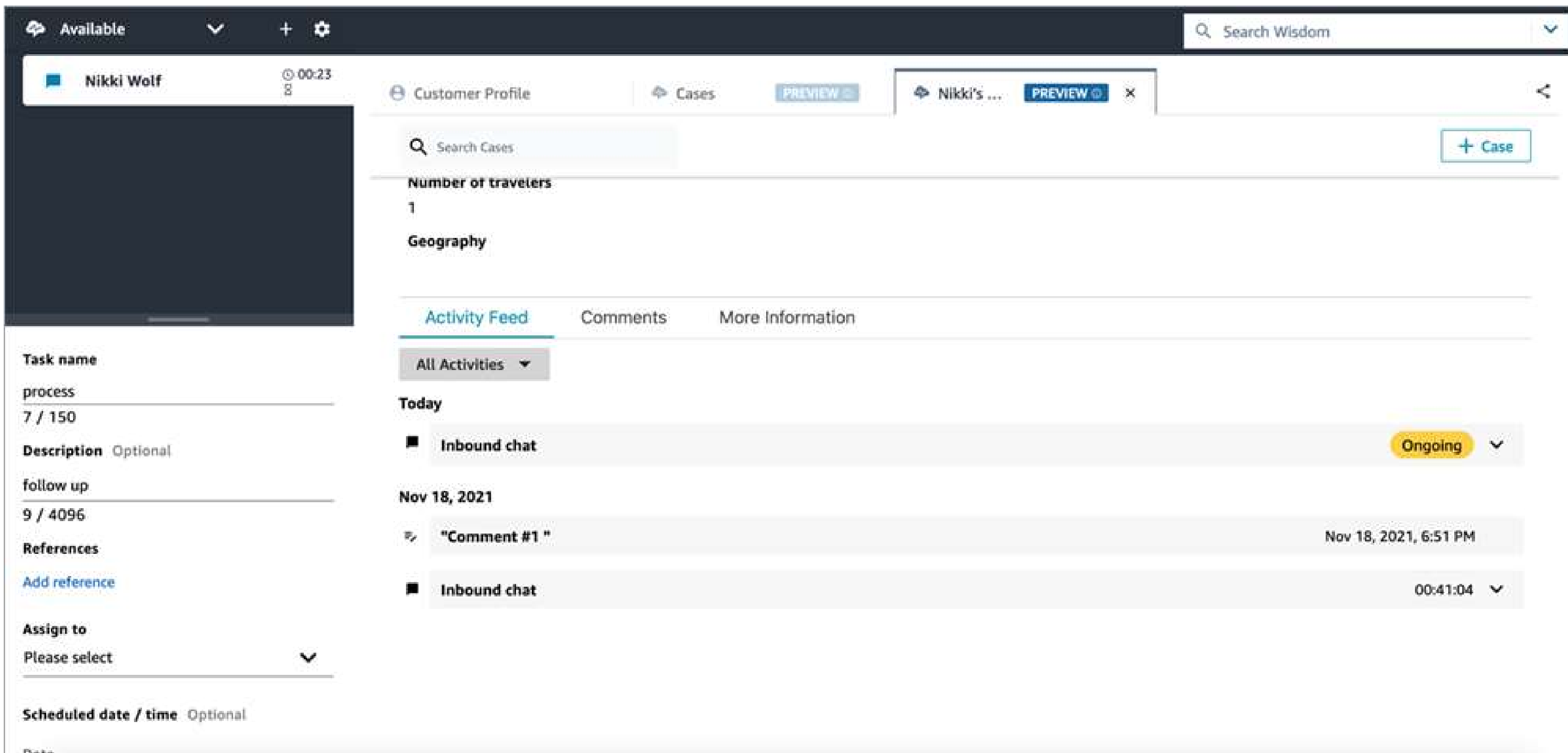
Create a task from a case

In the agent application, agents can add a task from a case. In the Contact Control Panel (CCP), they will see the task creation form.

When an agent creates a task from a case, the task is automatically associated with the case and it appears on the activity feed.



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Some layout options

1.4 Million
unfilled computing jobs by 2020(1)

75 Percent
of companies face disruption(2)

$116 Billion
lost productivity per year(3)

Current Options Are Not Solving the Problem

STAFFING AGENCY	CAMPUS HIRING	VISA TALENT	INTERNAL TRAINING	BOOTCAMPS
Do not help with shortage	Not enterprise ready	High compliance & legal costs; delays	Not core competency; bureaucratic	Demand-supply mismatch; fragmented

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Sources: (1) Bureau of Labor Statistics. (2) Gartner. (3) CIO Magazine.