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Amazon Connect Integration

MODULE 3-4 - AGENTS

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Amazon Connect Agents

Required permissions for adding users

Before you can add users to Amazon Connect, you need the following permissions assigned to your security profile: **Users - Create**.

Users and permissions

Type	All	View	Edit	Create	Remove	Enable / Disable	Edit permission
Users	☐	☑	☑	☑	☐	☐	☐
Agent hierarchy	☐	☐	☐	☐	☐	☐	☐
Security profiles	☐	☐	☐	☐	☐	☐	☐
Agent status	☐	☐	☐	☐	☐	☐	☐

By default, the Amazon Connect **Admin** security profile has these permissions

Amazon Connect Agents

Add a user individually

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 users.
2. Choose **Users**, **User management**.
3. Choose **Add new users**.
4. Choose **Create and set up a new user** and then choose **Next**.
5. Enter the name, email address, and password for the user.
6. Choose a routing profile and a security profile.
7. Choose **Save**. If the Save button isn't active, it means you're logged in with an Amazon Connect account that doesn't have the required security profile permissions.

To fix this issue, log in with an account that is assigned to the Amazon Connect Admin security profile. Or ask another Admin to help.

Amazon Connect Agents

Add users in bulk from a csv file

Use these steps to add several users from a csv file such as an Excel spreadsheet

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 users.
2. Choose **Users**, **User management**.
3. Choose **Add new users**.
4. Choose **Upload my users from a template (csv)** and then choose **Next**.
5. Choose **Download template**.
6. Add your users to the template and upload it to Amazon Connect.

If you get an error message, it usually indicates that one of the required columns is missing information, or there's a typo in one of the cells.

- We recommend checking the format of the phone number as a starting point in your investigation.
- If you get an error message that **Security profile is not found**, check whether there's a typo in one of the cells in the **security_profile_name_1** column.
- Update the .csv file and try uploading it again.

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Amazon Connect Agents

Delete users from your Amazon Connect instance

When a user is deleted from Amazon Connect, you won't be able to configure their agent settings anymore. For example, you won't be able to assign a routing profile to them.

What happens to the user's metrics?

The user's data in CTRs and reports is retained. The data is preserved for the consistency of the historical metrics.

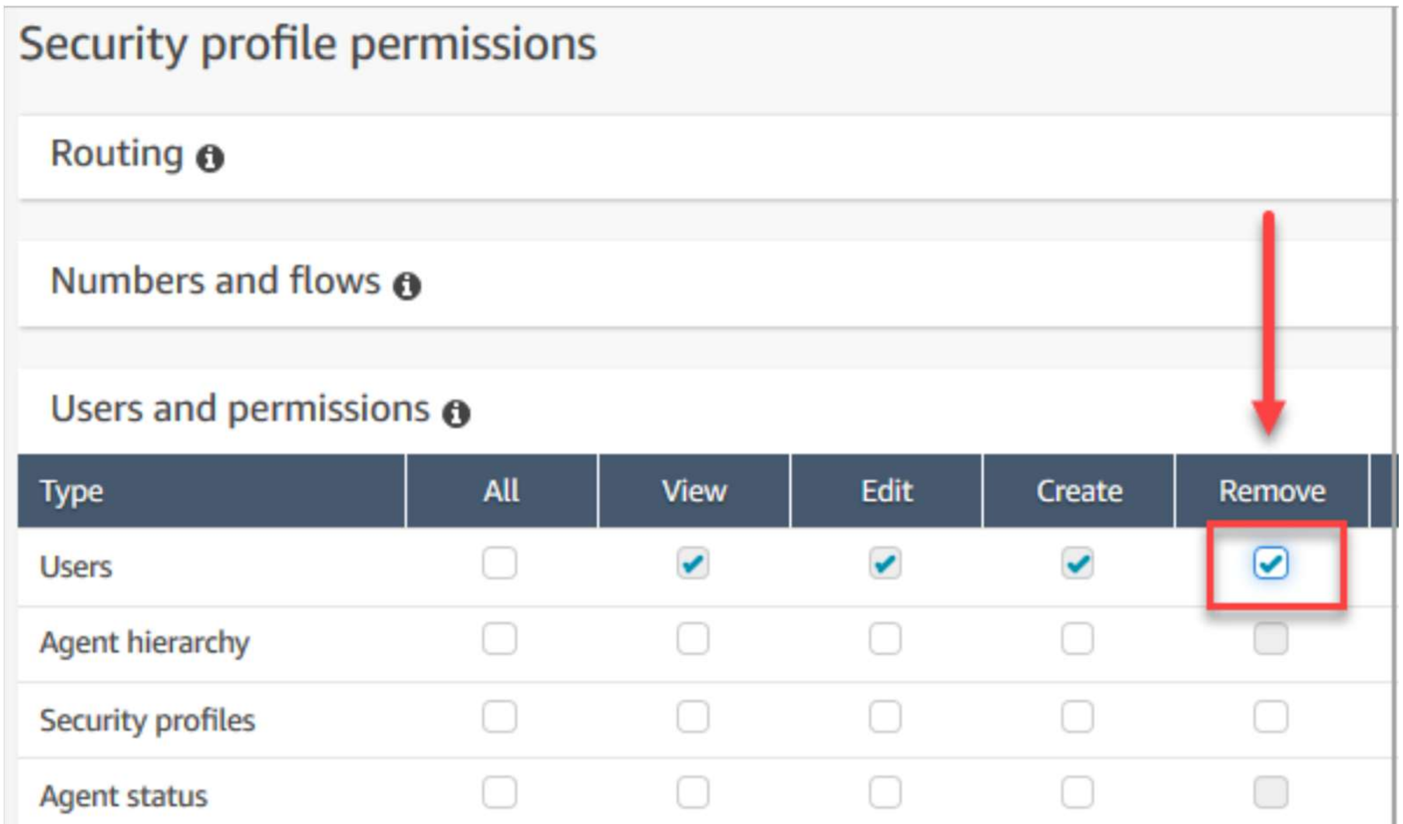
In the historical metrics reports, the agent's data will be included in the **Agent performance** metrics report. However, you won't be able to see an **Agent activity audit** of the deleted agent because their name won't appear in the drop-down list.

Amazon Connect Agents

Required permissions to delete users

Before you can update permissions in a security profile, you must be logged in with an Amazon Connect account that has the following permissions: **Users - Remove**.

By default, the Amazon Connect **Admin** security profile has these permissions.

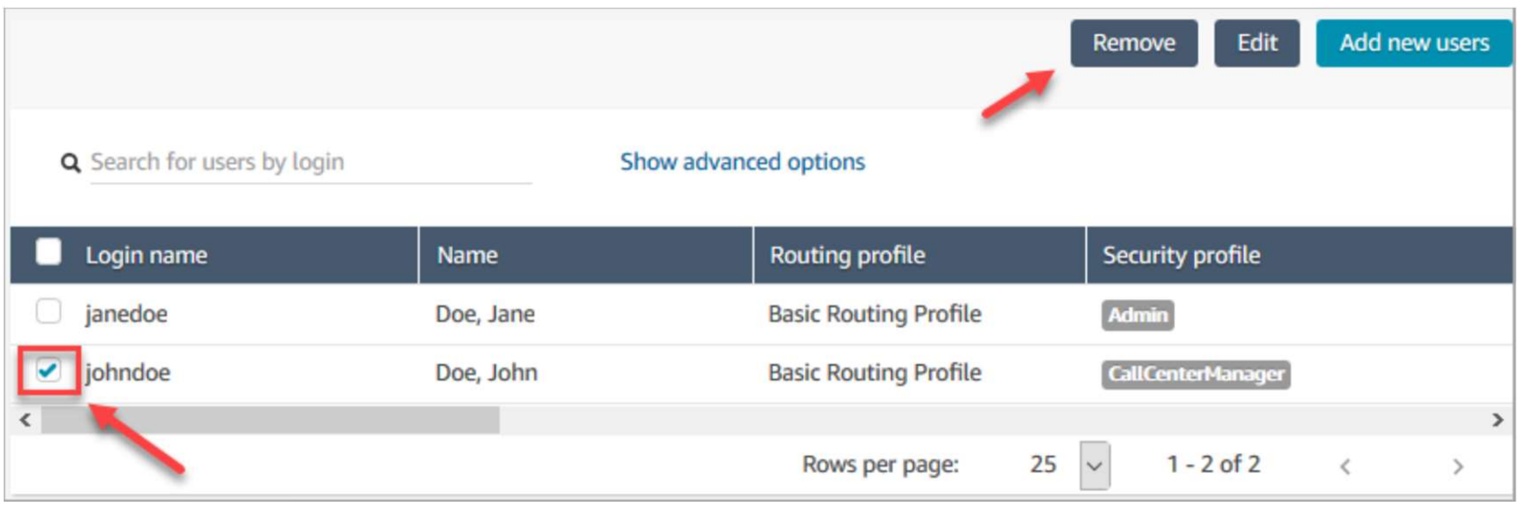


Amazon Connect Agents

How to delete users

You can't undo a deletion.

1. Log in to the Amazon Connect console with an **Admin** account, or an account assigned to a security profile that has permissions to remove users.
2. Choose the user account you want to delete, and then choose **Remove**.



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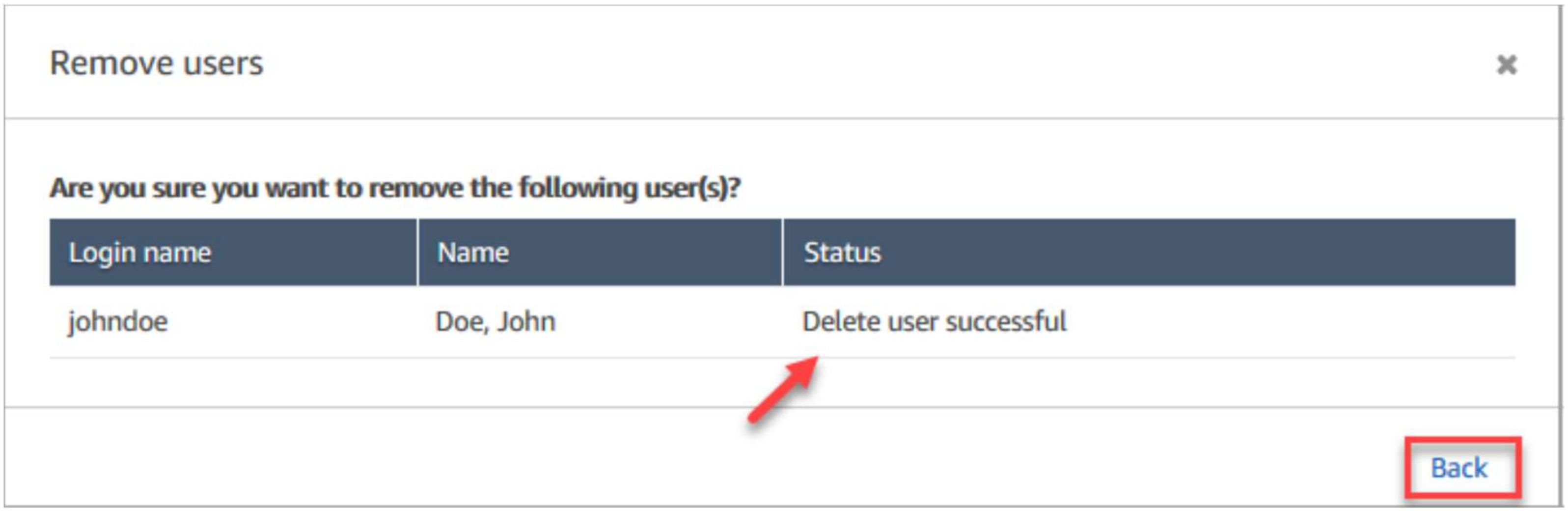
How to delete users (cont)

3. Confirm you want to delete that account.

Amazon Connect Agents

How to delete users (cont)

4. Note the status of account. Choose **Back** to return to the **User management** page.



Amazon Connect Agents

Reset a user's password for Amazon Connect

To reset a password for a user

1. Log in to your contact center using your access URL (https://*domain*.awsapps.com/connect/login).
2. Choose **Users**, **User management**.
3. Select the user and choose **Edit**.
4. Choose **reset password**. Specify a new password and then choose **Submit**.
5. Communicate the new password to the user.

Resetting the user's password will immediately log them out of the Contact Control Panel.

Amazon Connect Agents

Reset your agent or manager password

Use the following steps if you want to change your password, or if you forgot it and need a new one.

1. If you're an Amazon Connect agent or manager, at the login page, choose **Forgot Password**.
2. Type the characters you see in the image, and then choose **Recover Password**.
3. A message will be sent to your email address with a link that you can use to reset your password.

Amazon Connect Agents

Setting up Agents

You can manage and load-balance customer contacts using agent hierarchy organization and agent status management. These tools provide filtering and agent availability management per queue, skill set, and routing profiles.

Set up agent hierarchies

Agent hierarchies are a way for you to organize agents into teams and groups for reporting purposes. It's useful to organize them based on their location and their skill sets. For example, you might want to create large groups, such as all agents who work on a specific continent, or smaller groups such as all agents working in a specific department.

Amazon Connect Agents

Set up agent hierarchies

You can also configure hierarchies with up to five levels, and segment agents or teams. Here are a couple of things to note about using hierarchies:

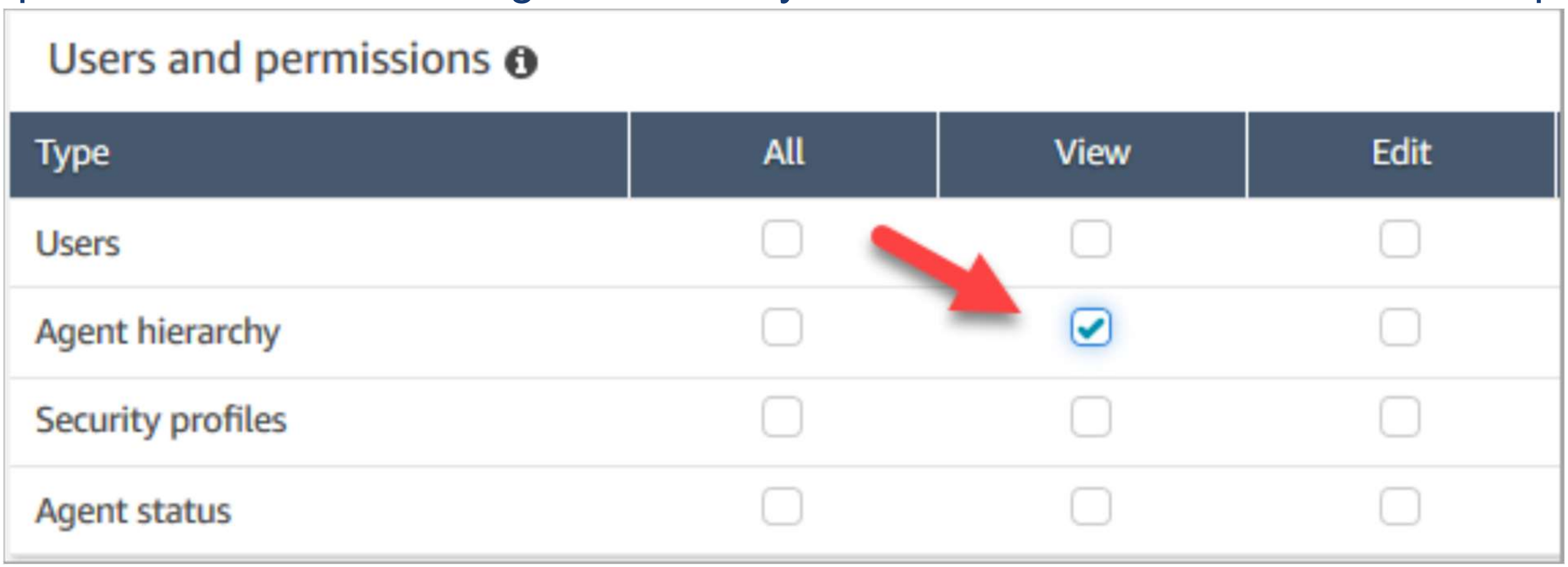
- Removing agents from a level affects historical reporting.
- When you use the **Restrict contact access** permission, you can restrict contact search results based on the agent's hierarchy.

Amazon Connect Agents

Required permissions

To create agent hierarchies, you need the **View - Agent hierarchy** permission in your security profile.

Note
Since agent hierarchies may include location and skill set data, you also need this permission to view the agent hierarchy information in a real-time metrics report.



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Amazon Connect Agents

Create a new agent hierarchy

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 agent hierarchies.
2. Choose **Users**, **Agent hierarchy**.
3. Enter a name and choose **+** to create the first level of your hierarchy.
4. Choose **+** to add more levels to your hierarchy.
5. Choose **Save** to apply the changes or **Cancel** to undo them.

Tip

If the Save button isn't active, you don't have permissions to create or edit the agent hierarchy.

Amazon Connect Agents

Add groups, teams, and agents to a hierarchy

After you create a hierarchy, you can add groups, teams, and agents from the top down.

1. Select the top level of the hierarchy.
2. Choose **x** to add groupings to each level.
3. Choose the check icon to save the name, choose the pencil icon to edit the name.
4. Choose **Save**.

Choose **View historical changes** to view the change history. You can filter changes by date (between two dates) or by user name. If you cannot see the link, ensure that you have the proper permissions to view these changes.

Amazon Connect Agents

Add custom agent status

Agents are responsible for setting their status in the Contact Control Panel (CCP). In fact, the only time an agent's status changes is when they manually change it in the CCP, or when their supervisor changes it in a real-time metrics report.

Amazon Connect provides two default status values:

- Available
- Offline

You can change the name of these values, and you can add new ones. For example, you might add a status for Lunch, and another for Training. These and the default status values will be used for reporting, metrics, and resource management.

When you add a new status, it will always be **Custom**, not routable.

You can't delete a status value but you can disable it so it doesn't appear on the agent's CCP

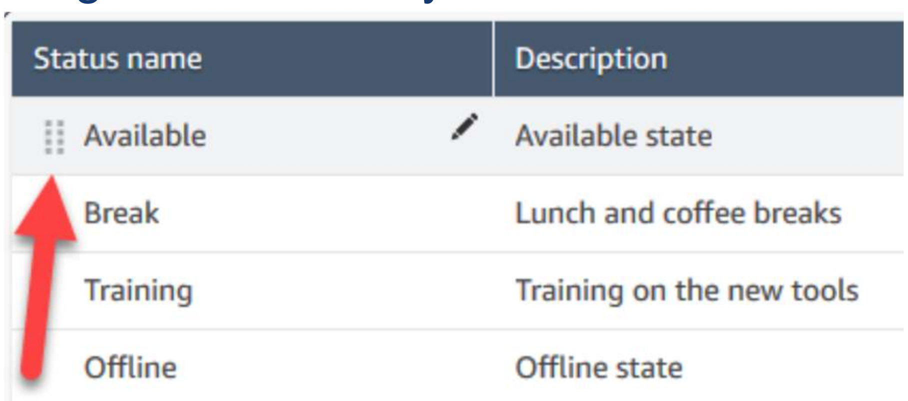
Amazon Connect Agents

Add custom agent status

To add a new agent status

1. Choose **Users, Agent status**, **Add new agent status**.
2. Enter a status name and description and select whether the status should appear in the CCP to the agent.
3. Choose **Save**.

To change the order that the status values appear in the CCP, click the waffle next to the status value and
drag it to the order you want.



Status name	Description
Available	Available state
Break	Lunch and coffee breaks
Training	Training on the new tools
Offline	Offline state

Amazon Connect Agents

To edit a status

1. Choose **Users**, **Agent status**.
2. Hover over the status name and choose the edit icon.
3. Enter the new information and choose **Save** to apply the changes.

Choose **View Historical Changes** to view the change history. You can filter changes by date (between two dates) or by user name. If you can't see the **View historical changes** link, make sure you have permissions to view these changes.

Amazon Connect Agents

Configure agent settings: routing profile, phone type, and auto-accept calls

Before you configure your agent settings, here is some info to have on hand. Of course, you can always change this information later.

- What is their routing profile? They can only be assigned one.
- Will they have the **Agent** security profile or a custom profile you created?
- Are they going to use a soft phone? If so, will they be connected to contacts automatically, or will they need to press the **Accept** button in their Contact Control Panel (CCP)?
- Or are they going to use a desk phone? If so, what is their number?
- How many seconds do they have for After contact work (ACW)? There's no way you can turn off ACW time altogether, so agents never go to ACW. (A value of **0** means an indefinite amount of time.)
- Are they going to be assigned to an agent hierarchy?

Note

You can't configure how long an available agent has to connect with a contact before it's missed. Agents have 20 seconds to accept or reject a contact. If no action is taken, the current agent’s status will be **Missed** and the contact is routed to the next available agent.

Amazon Connect Agents

To configure agent settings

1. In the navigation pane, go to **Users, User management**.
2. Choose the user you want to configure, then choose **Edit**.
3. Assign a routing profile (p. 147) to them. You can only assign one.
4. Assign the **Agent** security profile, unless you've created custom security profiles.
5. Under **Phone Type** choose whether the agent is using a desk phone or soft phone.

- If you select desk phone, enter their phone number.

Important

Outbound telephony charges occur when using a desk phone to answer inbound calls.

- If you select soft phone, choose **Auto-Accept Call** if you want agents to be connected to calls automatically. This doesn't apply to chats.

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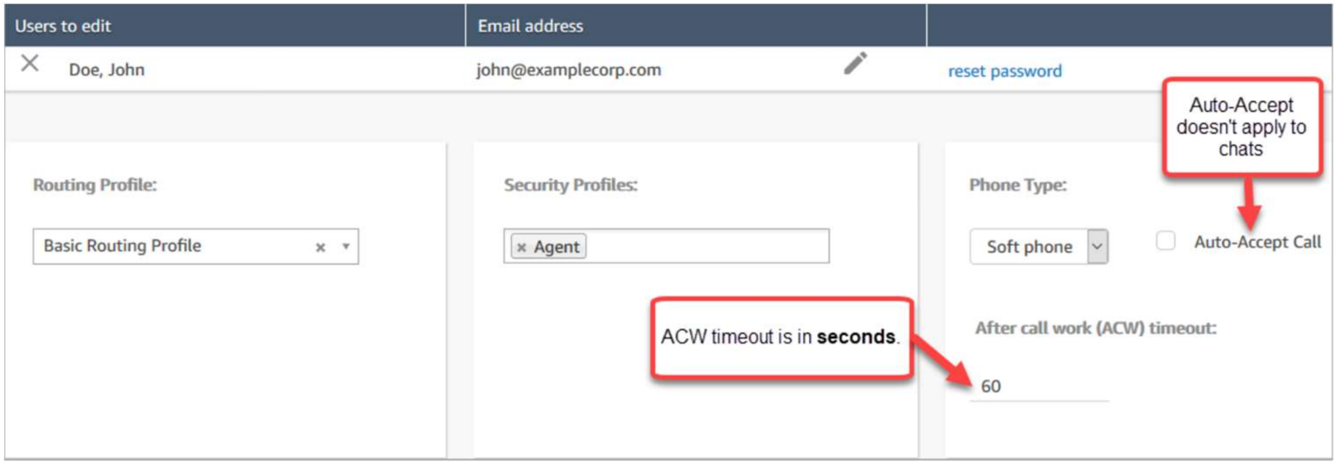
Amazon Connect Agents

To configure agent settings

6. In **After call work (ACW) timeout**, type how many seconds agents have for after contact work, such as entering notes about the contact. 1 second is the minimum amount of time you can enter.

Enter **0** if you don't want to allocate a specific amount of ACW time. It essentially means an indefinite amount of time. When the conversation ends, ACW starts; the agent must choose **Close contact** to end ACW.



7. Under **Agent Hierarchy** select any groups the agent should be part of.

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Amazon Connect Agents

Enable auto-accept call for agents

When Auto-Accept Call is enabled for an available agent, the agent connects to contacts automatically.

How long until the call is connected to the agent? Less than one second. When a call arrives to an available agent who has Auto-Accept Call enabled, the Contact Control Panel (CCP) briefly shows the options **Accept** or **Reject**. This is expected behavior. After less than a second, the call is automatically accepted and these options disappear.

Auto-Accept Call doesn't work for callbacks.

You can't enable Auto-Accept Call while editing multiple existing users in your Amazon Connect instance. You must edit existing users individually to enable it. You can also configure the setting for multiple new users when you bulk upload new users with the CSV template.

Amazon Connect Agents

Enable auto-accept call for existing agents

To complete these steps, you must log in as a user who has the following permissions in their security profile: **Edit, Create, Remove, Enable / Disable, and Edit permission**.

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 or edit users.
2. In the left navigation bar, choose **Users**, **User management**.
3. In the list of users, select an agent, and then choose **Edit**.
4. On the Edit users page, under Phone Type, select the **Auto-Accept Call** check box.
5. Choose **Save**.
6. Repeat these steps for each user that you want to edit.

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Amazon Connect Agents

Bulk upload new users with auto-accept call enabled

You can't use the CSV template to edit information for existing users. If you include duplicate users with different information in the CSV template, you will receive an error.

1. Log in to your Amazon Connect instance using your access URL (https://*domain*.awsapps.com/connect/login).
2. In the left navigation bar, choose **Users**, **User management**.
3. Choose **Add new users**.
4. Under **How do you want to set up your existing users?**, next to **Upload my users from a template (csv)**, choose **template** to download a pre-formatted CSV file.
5. In the CSV file, configure the details for the new users who you want to add. For **soft phone auto accept (yes/no)**, be sure to enter **yes**.
6. After configuring the CSV file, in your Amazon Connect instance, choose **Upload my users from a template (csv)**, and then choose **Next**.
7. Under **Select and upload a spreadsheet with user details**, choose **Choose file**.
8. Choose the configured CSV file from its location on your computer.
9. In your Amazon Connect instance, choose **Upload and verify**.
10. Under **Verify user details**, verify that the information is correct for the new users, and then choose **Create users**.

Amazon Connect Agents

Verify the change in CCP logs

To confirm that **Auto-Accept Call** is enabled for an agent, download the CCP logs generated for that agent: in the CCP for the agent, choose **Settings**, **Download logs**. The logs are saved to your browser's default download directory.

In the logs, the **autoAccept** attribute is set to **"true"** if this setting is enabled. The logs show something like this:

“type”: “agent”,
“initial”: false,
“softphoneMediaInfo”: {
    “callType”: “audio_only”,
    “autoAccept”: true

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Amazon Connect Agents

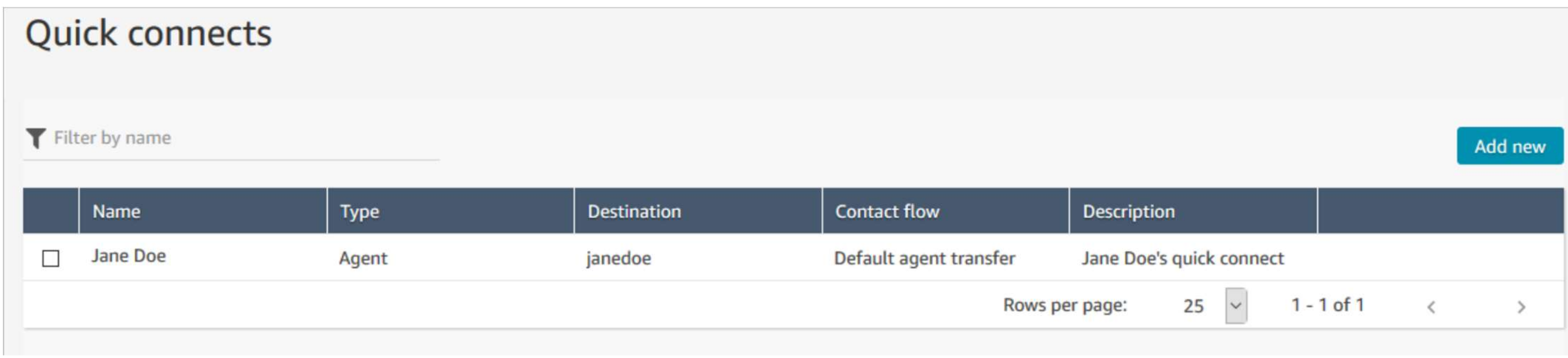
Set up agents to assign tasks to themselves

For an agent to be able receive a task, they need a quick connect created for them. With this quick connect, agents will be able to assign tasks to themselves, and other agents will be able to assign tasks to them.

Amazon Connect Agents

Step 1: Create a quick connect for the agent

1. On the navigation menu, choose **Routing**, **Quick connects**, **Add a new**.
2. Enter a name for the quick connect, such as the name of the agent. For example, if you want Jane Doe to be able to assign tasks to herself, enter **Jane Doe**.
3. Under **Type**, use the dropdown list to choose **Agent**.
4. Under **Destination**, use the dropdown list to choose the user name for the agent.
5. Under **Contact flow**, choose **Default agent transfer**, or the appropriate contact flow for your contact center.
6. Under **Description**, enter a description, such as **Jane Doe's quick connect**.
7. Choose **Save**.



Amazon Connect Agents

Step 2: Create a queue for the agent and associate the quick connect

1. After you create the quick connect, go to **Routing**, **Queues** and add a queue for the agent.
2. On the **Add new queue** page, in the **Quick connects** box, search for the quick connect you created for the agent.
3. Select the quick connect and then choose **Save**.

Step 3: Add the queue to the agent's routing profile

1. Go to **Users**, **Routing profiles** and choose the agent's routing profile.
2. Add the agent's queue to the routing profile and choose **Task** for the channel. If the agent can receive transfers through other channels, select them as well.
3. Choose **Save**.

Amazon Connect Routing

Exercise:

Export an agent list then import a list

Create agent hierarchies

Create quick connect for an agent

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