



Amazon Connect App for Zendesk v2.2

Installation and User Guide

Version 2.2 [Mar 2021]



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1 Amazon Connect Documentation

User should be familiar with Amazon Connect prior to installing and configuring the Amazon Connect app for Zendesk.
Please refer to the [Amazon Connect Administrator Guide](#).

Available to all customers on a Zendesk Suite plan or Customers with Support + Talk Partner Edition - Learn more at <https://www.zendesk.com/pricing>

2 Amazon Connect app for Zendesk

The Amazon Connect app can:

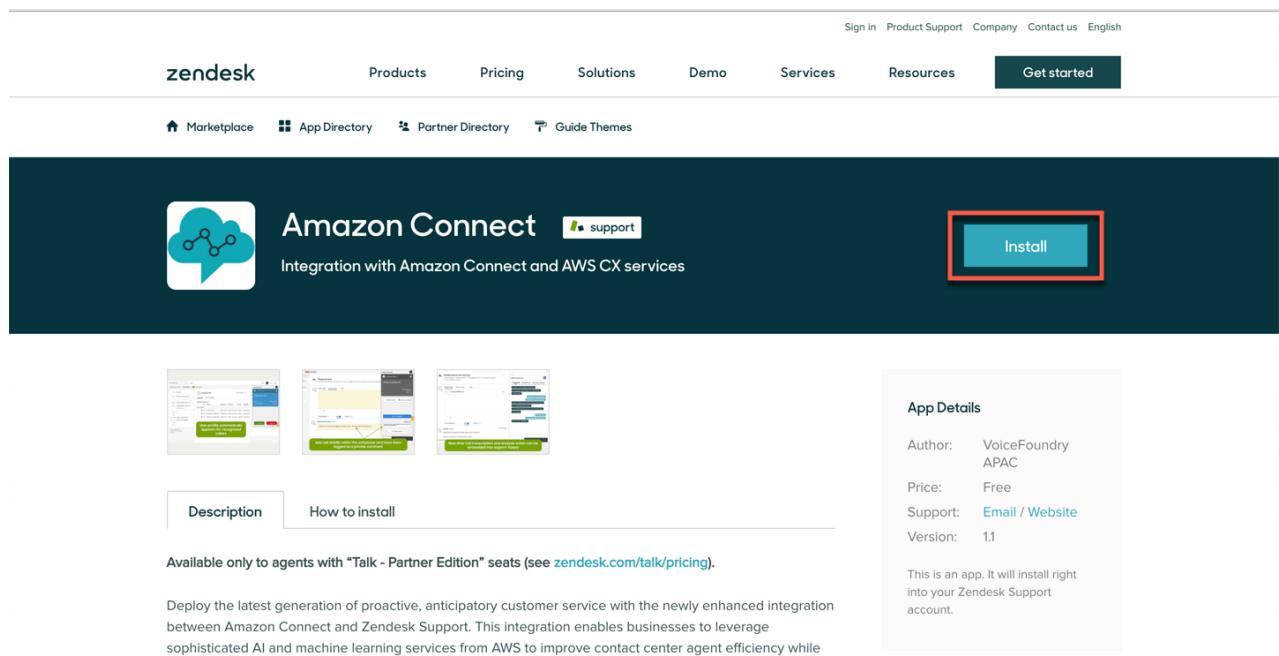
- Embed Amazon Connect's web-based softphone on the top bar of a Zendesk Support instance
- Link callers to a Zendesk Support user profile based on
 - the caller's phone number (CLI)
 - the caller's user ID
 - custom Zendesk user fields (e.g. account number, Organisation ID, email address etc)
 - the caller's ticket ID
 - the most recent open ticket of an identified user
 - templated searches for other queries supported by the Zendesk API
- Automatically create a new ticket for each call, or allow an agent to manually create a new ticket or attach the call to an existing ticket.
- Attach the following to a Zendesk Support ticket
 - Amazon Connect contact details
 - Call recording with audio playback and a download link
 - Advanced speech analysis through Amazon Connect's Contact Lens
 - Call Transcription
 - Customer and agent sentiment
 - Categories based on rules set within Contact Lens
 - Conversation characteristics
- Pause and resume a call recording.
- Enable media-less mode. This means that the embedded CCP instance will not carry any media, allowing your Zendesk Support instance to run in VDI environments, as well as reloading your Zendesk instance without interrupting a live call.

3 Installation guide

3.1 Installing the Amazon Connect app

 You need to have administrator access in your AWS account in order to install the app.

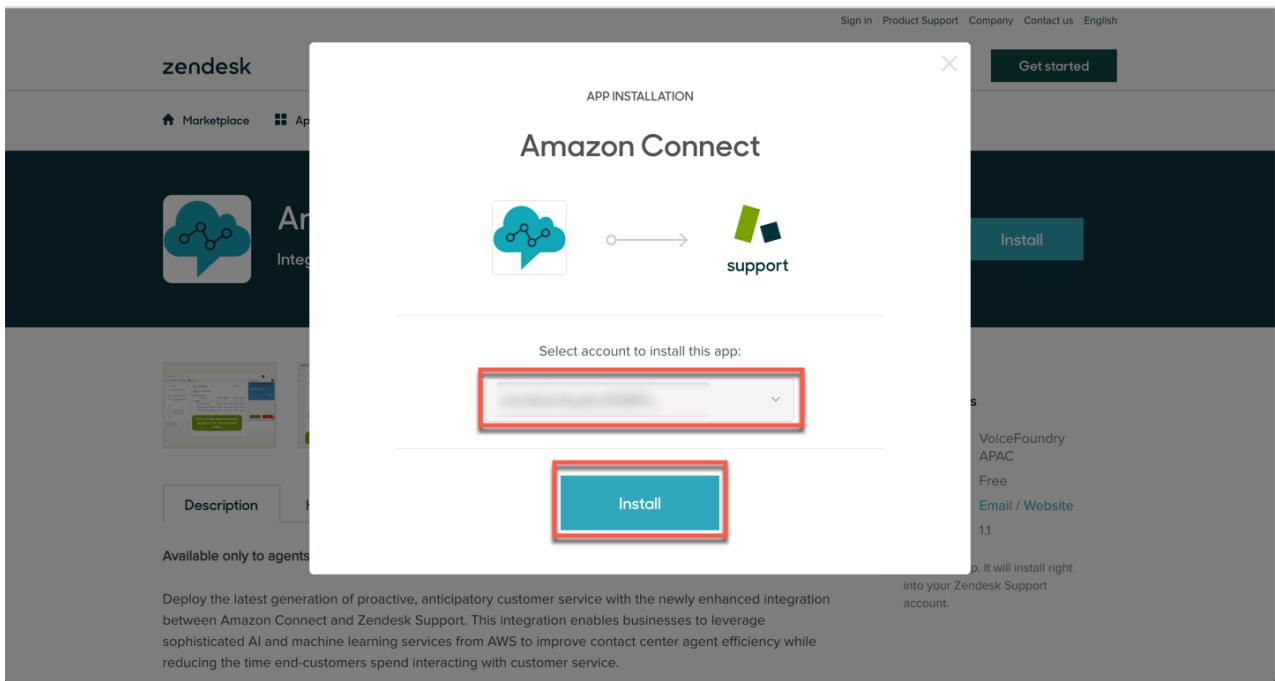
Search for the [Amazon Connect app](#) in the Zendesk Marketplace and click on install.



The screenshot shows the Zendesk Marketplace interface. At the top, there's a navigation bar with links for Sign in, Product Support, Company, Contact us, and English. Below the navigation, the Zendesk logo is on the left, followed by links for Products, Pricing, Solutions, Demo, Services, Resources, and a prominent 'Get started' button. Underneath these are links for Marketplace, App Directory, Partner Directory, and Guide Themes. The main content area features the 'Amazon Connect' app listing. It includes a blue icon with a cloud and speech bubbles, the app name 'Amazon Connect', a 'support' link, and a brief description: 'Integration with Amazon Connect and AWS CX services'. To the right of the description is a large blue 'Install' button, which is outlined in red in the screenshot. Below the description, there are three small screenshots of the app's interface. Further down, there are two tabs: 'Description' (which is selected) and 'How to install'. A note below the tabs states: 'Available only to agents with "Talk - Partner Edition" seats (see [zendesk.com/talk/pricing](#)).'. Another note below that says: 'Deploy the latest generation of proactive, anticipatory customer service with the newly enhanced integration between Amazon Connect and Zendesk Support. This integration enables businesses to leverage sophisticated AI and machine learning services from AWS to improve contact center agent efficiency while reducing the time end-customers spend interacting with customer service.' To the right of the app listing is a light gray sidebar titled 'App Details' containing the following information: Author: VoiceFoundry APAC, Price: Free, Support: Email / Website, and Version: 1.1. A note at the bottom of the sidebar states: 'This is an app. It will install right into your Zendesk Support account.'

Select the Zendesk instance you want to install this app in and click on install.

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3.2 Configure the app's settings

Configure the below settings for the app.

1. Amazon Connect URL

Enter the Amazon Connect URL that you want to connect with your Zendesk account.

Amazon Connect URL*

Ask your administrator to provide you with the URL for your Amazon Connect instance (eg. either <https://instance-name.awsapps.com>, or <https://instance-name.my.connect.aws>).



When entering your Amazon Connect URL, make sure you omit `/connect/login` from the URL. For example, the URL for your Connect instance should be in the following format <https://instance-name.awsapps.com>, or <https://instance-name.my.connect.aws>

2. Single sign-on URL (optional)

This field is only required if your Connect instance is configured with single sign-on (SSO). Enter the SSO URL for your Connect instance from your Identity Provider (IDP).

3. Default entry point phone number

Enter the call centre number that will be reported in tickets as the number that the call was dialled from in outbound calls and the number that was called in inbound calls. For inbound calls it can be overridden by setting the `dialed_number` attribute in your contact flow.

Default entry point phone number*

The call centre number that will be reported in tickets as the number that the call was dialed from in outbound calls and the number that was called in inbound calls. For inbound calls it can be overriden by setting the `dialed_number` attribute in your contact flow.

4. Default country dialling prefix (optional)

If set, this prefix will be used when making outbound calls in Zendesk for users whose phone numbers are in your local format. E.g. adding +61 for Australia.

Default country dialing prefix

If specified, this prefix will be used in matching Zendesk users' telephone numbers that are in local format (without the prefix). Example: +61 for Australia.

5. Connect time zone (optional)

Enter your time zone, eg. Australia/Sydney, so that the Contact Trace Records linked from within ticket comments will be displayed in your local date/time. If this is not specified it will default to UTC. You can view a list of the different time zones [here](#).

Connect time zone (optional)

Enter time zone, eg. Australia/Sydney, so that the Contact Trace Records linked from within ticket comments will display in desired local date/time. If not specified it will default to UTC. You can view a list of the different time zones [here](#).

Australia/Sydney

6. Create ticket after minutes (optional)

This setting controls whether a recent ticket of a recognised caller should be opened instead of creating a new one. E.g. setting this to 15 means that a new ticket will be created if there hasn't been a ticket created or updated in the last

15 minutes for that user. It can be overridden by setting the `recent_ticket_timeout` attribute in your contact flow.

Create ticket after minutes

This setting controls whether a recent ticket of a recognised caller should be opened instead of creating a new one. If there's no ticket updated within the specified time then new ticket will be created. It can be overridden by setting the `recent_ticket_timeout` attribute in your contact flow.

7. Contact attribute name containing Zendesk ticket number (optional)

If this attribute is set in a contact flow the ticket number specified will be opened, instead of creating a new one.

 NOTE: the name of this attribute can be changed in the corresponding app setting.

Contact attribute name containing Zendesk Ticket Number

If an Amazon Connect contact attribute with this name is set in a contact flow then the specified Zendesk ticket will be opened.

zendesk_ticket

8. Enable media-less mode (optional)

Select this option if you are using your Zendesk account in a VDI environment. This option will also allow you to reload your Zendesk instance without interrupting a live call as well as preventing duplicate tickets from being created if you have more than one tab of Zendesk open in your browser. See detailed steps further in this document on how to sign in to Zendesk if you have media-less mode enabled.

Enable media-less mode

Select this option if you are using your Zendesk account in a VDI environment. You will first need to open the CCP in an independent window or tab before launching this app.



If you have media-less mode enabled, ensure you first log in to the CCP in an independent window or tab before launching this app in Zendesk, otherwise the app will not function correctly.

Once you have configured the app's settings click on install.

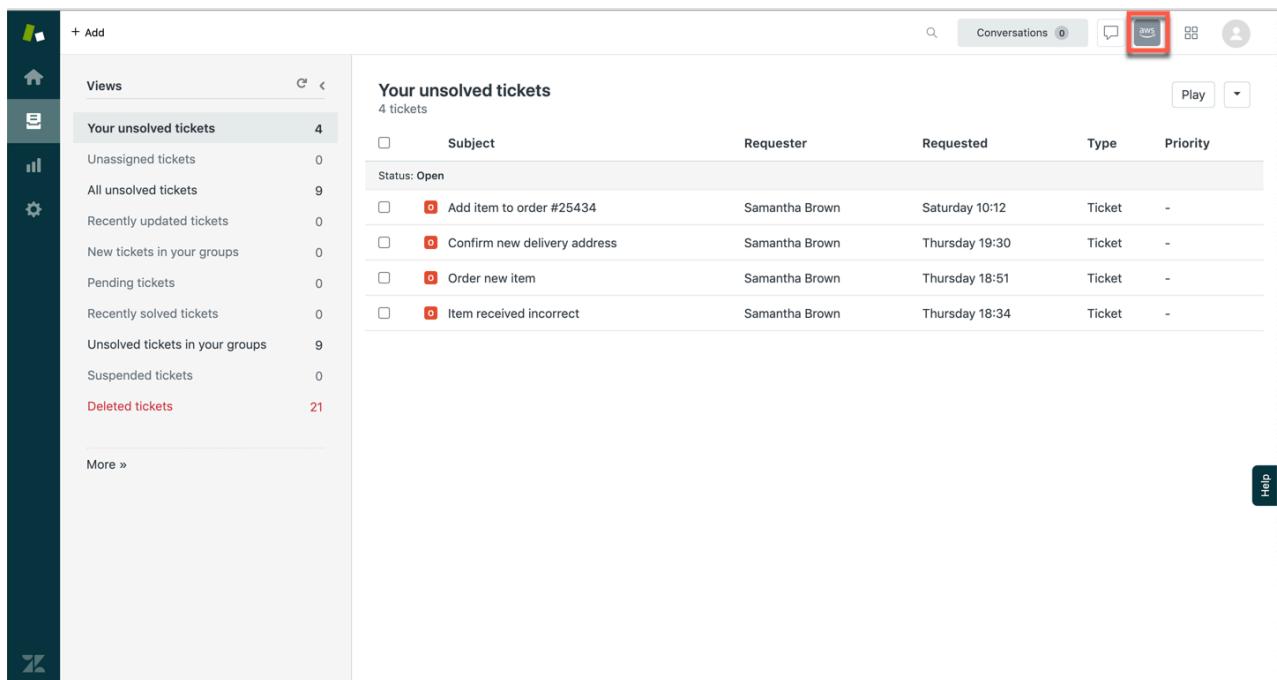
Amazon Connect App for Zendesk v2.2

By installing this app you hereby agree to the [Zendesk Marketplace Terms of Use](#).

Install

3.3 Whitelist URL's in Connect

Click on the Amazon Connect app icon in the top right corner of your Zendesk instance.



The screenshot shows the Zendesk ticket management interface. On the left, there's a sidebar with a dark theme containing a navigation menu and a 'Views' section. The 'Views' section has a sub-section titled 'Your unsolved tickets' which shows 4 tickets. The list includes: 'Unassigned tickets' (0), 'All unsolved tickets' (9), 'Recently updated tickets' (0), 'New tickets in your groups' (0), 'Pending tickets' (0), 'Recently solved tickets' (0), 'Unsolved tickets in your groups' (9), 'Suspended tickets' (0), and 'Deleted tickets' (21). Below this is a 'More »' link. On the right, the main area displays a table titled 'Your unsolved tickets' with 4 tickets. The columns are: Subject, Requester, Requested, Type, and Priority. Each row contains a checkbox, the ticket subject (e.g., 'Add item to order #25434'), the requester ('Samantha Brown'), the requested time ('Saturday 10:12'), the type ('Ticket'), and the priority ('-'). The table header includes filters for 'Status: Open'. At the top right of the Zendesk interface, there are several icons: a magnifying glass for search, a speech bubble for conversations (0), a person icon, and the 'aws' icon, which is highlighted with a red box. There are also 'Play' and 'Help' buttons at the bottom right.

The app will display two URLs which need to be whitelisted in your Connect instance.

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Sign in to your AWS account, go to Amazon Connect and click on your Connect instance. Click on *application integration* on the left hand side menu.



Amazon Connect > [instance]

Overview

Telephony

Data storage

Data streaming

Application integration

Contact flows

Click on *add origin*.

Amazon Connect > [instance]

Application integration

Amazon Connect can integrate with other products including Customer Relationship Management (CRM) and Workforce Management (WFM) products. Click on the link for details on how to set up integrations with Amazon Connect. [Learn more](#)

Approved origins

Once you integrated with a CRM product, add the origins (scheme + host + port) that Amazon Connect will need to have access to.

[redacted] remove
[redacted] remove
[redacted] remove

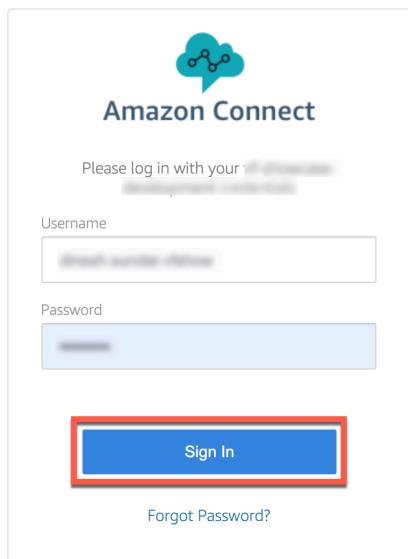
+ Add origin

Copy one of the URLs from the app's loading screen and paste it into the field. Click on *add*.

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Click on *add origin* again. Copy the other URL from the app's loading screen and paste it into the field. Click on *add*.

Refresh your Zendesk instance. Click on the Amazon Connect app icon in the top right corner of your Zendesk instance. A new tab will open. Enter your Amazon Connect username and password and then click on *sign in*.



After you have successfully signed in to Amazon Connect the tab will automatically close. The Amazon Connect app should now load in Zendesk.

A screenshot of the Zendesk software interface. On the left is a dark sidebar with various icons and a list of ticket categories. The main area shows a table of 'Your unsolved tickets' with four items listed. Overlaid on the right side of the screen is a smaller window titled 'Amazon Connect'. This window has a red border and contains a message 'Welcome Dinesh' above two blue speech bubble icons. At the bottom of the window are buttons for 'Quick connects' and 'Number pad'. A red arrow points from the text 'Amazon Connect softphone will load within the app' towards the overlaid window.

You are now ready to receive inbound calls and make outbound calls within Zendesk using the Connect softphone.

3.4 Enabling speech analysis using Contact Lens

Enabling speech analysis using Contact Lens will allow you to automatically attach the following to your tickets:

- Call Transcription
- Customer and agent sentiment
- Categories based on rules set within Contact Lens
- Conversation characteristics



NOTE: pay-as-you-go charges apply if you enable Contact Lens in your Amazon Connect instance.

To find out how you can enable the speech analysis feature, view the detailed description and installation guide [here](#).

3.5 Enabling pause and resume call recordings

The pause and resume feature allows agents to pause and resume a call recording during a call with a customer. This feature is useful when a customer is providing sensitive information over the phone.

To find out how you can enable the pause and resume feature, view the detailed description and installation guide [here](#).

3.6 Zendesk Search for Connect with the help of the Zendesk Support API

Zendesk Search for Amazon Connect is an optional add-on to the Amazon Connect app for Zendesk. It enables driving the business logic of either a DTMF driven (classic IVR) or conversation driven (LEX bot) contact flow, based on query results from the Zendesk Support API.

The following types of searches are supported:

- search for user by user ID
- search for user by caller's phone number (CLI)
- search for user by custom user fields
- search for ticket by ticket ID
- search for most recent open ticket of an identified user
- templated searches for other queries supported by the Zendesk API

The search is performed within a contact flow by calling a lambda function which is installed as part of the corresponding serverless application within the AWS Serverless Application Repository. This lambda in turn calls the Zendesk Support API with a specific search query, based on parameters passed from the contact flow.

Lambda functions called from Amazon Connect follow a simple interface - accepting a key/value map of arguments and returning another key/value map as a response. In the contact flow, values are then extracted from the map as contact flow attributes of type *External* and using the key as the attribute name or directly as `$.External.<key>` (see [this AWS documentation](#) for more in-depth information).

3.6.1 Enabling the Zendesk Search for Connect feature

For more information on how you can enable this feature, view the detailed description and installation guide [here](#).

4 Open source

As of Feb 2020 we've now made the app open source. This enhancement will allow for a more rapid pace of innovation. There are occasionally features that a customer would like to be included in the app, however these have not yet been prioritised or built by us. Transitioning the app to open source will allow customers to contribute features that they need ahead of when we can prioritise to build them. Head over to our GitHub account (<https://github.com/voicefoundryap/amazon-connect-for-zendesk>) to learn how you can contribute towards the development of the app.

5 Admin guide

5.1 Terminology used

The following terminology is used within this document.

<i>attribute</i>	An Amazon Connect custom attribute which, if set within a contact flow, will override the default configuration set within the app's settings.
<i>pop / popped</i>	To automatically open a new tab (or shift focus to an existing one) in Zendesk for a specific user or ticket.
<i>auto assignment</i>	Setting where tickets are created and/or assigned to the call automatically based on conditions and rules described in this document (default behaviour).
<i>manual assignment</i>	Setting where users or tickets are presented to the agent (popped), and then it's up to the agent to either create a new ticket (and for which user), or select an existing ticket and attach the call to it. To enable manual assignment set the attribute <code>ticket_assignment</code> to <code>agent</code> in your contact flow.
<i>recognised user</i>	A caller that was identified as an existing Zendesk user.
<i>unrecognised caller</i>	A caller that could not be identified as an existing Zendesk user.
<i>anonymous caller</i>	A caller whose CLI came across as "anonymous" or "private" and therefore could not be identified as an existing Zendesk user.
<i>user profile</i>	A Zendesk user profile.
<i>contact flow</i>	An Amazon Connect contact flow.
<i>app setting</i>	The Amazon Connect app settings. To view or edit the app's settings in Zendesk, go to <code>admin</code> , click on <code>manage</code> under <code>apps</code> and select the Amazon Connect app.

5.2 Contact flow attributes

Contact attributes are used to set the behaviour of the app. Contact attributes can be set within your contact flows. An attribute can be set to the same desired value at the start of every contact flow, or can be set dynamically, based on the business logic of the containing flow.

Below is a list of the configuration settings for each contact attribute, each with its default setting and the name of the attribute that overrides that default, if set in the contact flow.



Any attributes set within a contact flow will override its corresponding app setting.

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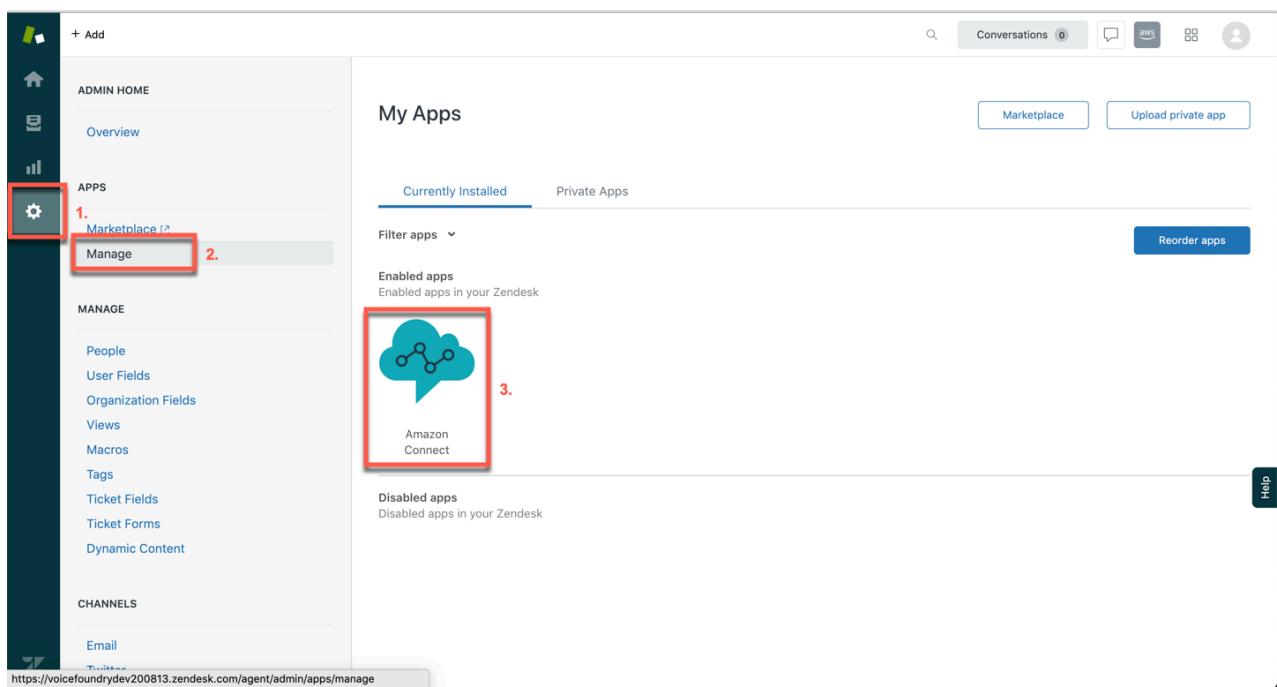
Setting name	Attribute name	Description	Default setting	App setting name	Attribute values
Recent ticket timeout	recent_ticket_timeout	This setting controls whether a recent ticket of a recognised caller should be opened instead of creating a new one. E.g. setting this to 15 means that a new ticket will be created if there hasn't been a ticket created or updated in the last 15 minutes for that user.	0	Create ticket after minutes	numerical value (in minutes)
Ticket assignment behaviour	ticket_assignment	Determines how tickets are created or assigned to a call. When set to <i>auto</i> a new ticket will be created for each call. When set to <i>agent</i> the agent will have control over the creation of new tickets or selecting from existing ones to attach the call to.	auto	Does not have an app setting. Can only be set within a contact flow.	auto; agent
Pop customer or ticket details before accepting the call	pop_incoming	If this option is set to <i>false</i> then customer or ticket details will be displayed in Zendesk only after the agent accepts the incoming call.	true	Does not have an app setting. Can only be set within a contact flow.	true; false
Insert call details with embedded call recording	voice_comment	When set to <i>true</i> , call details such as where the call originated from, who answered it, time and length of the conversation and audio recording of the call with embedded player will be attached to the ticket.	true	Does not have an app setting. Can only be set within a contact flow.	true; false
Provide a link to download the call recording file	download_recording	When set to <i>true</i> , a link to download the audio file (.wav) of the call recording will be attached to the ticket.	true	Does not have an app setting. Can only be set within a contact flow.	true; false
Dialled number	dialed_number	The number reported in tickets as the number that the caller dialled in inbound calls. This is usually set in contact flows from <i>System.DialedNumber</i> . If not set, the outbound CLI number specified in the app setting will be used.	null	Default entry point phone number	Phone number in E.164 format only
Zendesk ticket number	zendesk_ticket	If this attribute is set in a contact flow the ticket number specified will be opened, instead of creating a new one. <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> i NOTE: the name of this attribute can be changed in the corresponding app setting. </div>	null	Contact attribute name containing Zendesk Ticket Number.	Zendesk ticket number (entered by caller within IVR)

Setting name	Attribute name	Description	Default setting	App setting name	Attribute values
Zendesk user ID	zendesk_user	The ID of an existing Zendesk user. If this is set in a contact flow the app will disregard the caller's CLI and search for a user by this ID.	null	Does not have an app setting. Can only be set within a contact flow.	Zendesk user ID (entered by caller within IVR)
Customer's phone number	customer_number	Customer's phone number can be entered in the contact flow (using Store Customer Input block with phone number). If this is set in a contact flow the app will disregard the caller's CLI and search for a user by this attribute.	null	Does not have an app setting. Can only be set within a contact flow.	Customer phone number (entered by caller within IVR)
Customer's name	customer_name	Although Zendesk may treat a customer as an unrecognised caller, their name could be obtained from another source, eg. sales database within the contact flow. Using this attribute that name would then be applied to the newly created Zendesk user instead of the CLI.	null	Does not have an app setting. Can only be set within a contact flow.	Corresponding name from table
Customer's language	customer_language	A 2-letter language code, required for speech analysis. Supported language codes are: en, es, fr, de, it, pt, ar, hi, ja, ko, zh, and zh-TW.	en	Does not have an app setting. Can only be set within a contact flow.	2-letter language code only
Force ticket creation	force_ticket_creation	When the ticket assignment attribute is set to <i>agent</i> , this attribute will determine whether to force create a ticket after the call finishes, if the agent hasn't already created or assigned a ticket during the call.	true	Does not have an app setting. Can only be set within a contact flow.	true; false
Advanced speech analysis	speech_analysis	Performs real-time transcription, text comprehension and sentiment analysis and allows you to attach results to Zendesk tickets. Can use any of the values transcript, comprehend, sentiment, or a combination of them separated by comma.	null	Does not have an app setting. Can only be set within a contact flow.	transcript; comprehend; sentiment
Pause / resume recording	pause_recording	Allows the agent to pause and resume a call recording	null	Does not have an app setting. Can only be set within a contact flow.	true; false

5.3 App settings

The app's settings are configured in Zendesk. To view/edit the app's settings, go to your Zendesk instance. Click on the *admin* icon in the left navigation bar, and under *apps* select *manage*. Click on the *Amazon Connect* app.

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5.4 Default settings and assumptions

The default settings specify the behaviour of the app if no contact attributes have been set within your contact flows. Default settings for the app are as follows:

Setting name	Default setting	Default description
Recent ticket timeout	not set	
Ticket assignment behaviour	auto	By default, a new ticket is created for each call.
Pop customer or ticket details before accepting the call	true	By default, customer or ticket details will pop for the agent before they accept a call.
Insert call details with embedded call recording	true	By default, call details with embedded call recording will be attached to every call.
Provide a link to download the call recording file	true	By default, a link to download the call recording file will be attached to every call.
Force ticket creation	true	By default, a ticket will be automatically created after the call finishes, if the agent hasn't already created or assigned a ticket during the call. Note this only applies when the ticket assignment attribute is set to <i>agent</i> .
Dialled number	not set	
Zendesk ticket number	not set	

Setting name	Default setting	Default description
Zendesk user ID	not set	
Customer's phone number	not set	
Customer's name	not set	
Customer's language	en	By default, the language for speech analysis is set to english.
Advanced speech analysis	not set	

5.5 Enabling media-less mode

Media-less mode detaches the audio channel from the embedded Connect softphone within your Zendesk instance. The embedded softphone continues to function in all other aspects, such as accepting the call, creating and/or attaching call details to a Zendesk Support ticket, transferring a call to another agent, etc. The audio channel on the other hand needs to be handled by a separate instance of your Contact Control Panel (CCP), which must be launched before the agent starts receiving calls in the connector app.

5.5.1 Virtual Device Infrastructure (VDI) environments

The main purpose of media-less mode is to facilitate the use of the connector app in Virtual Device Infrastructure (VDI) environments where the standard embedded softphone won't work.

5.5.2 Page and app refreshes

Another use of media-less mode is to bridge the otherwise interrupted audio channel when an agent reloads the Zendesk browser tab.

Normally, when a reload (or refresh) happens, the standard embedded softphone CCP reinitialises and therefore breaks the audio connection with the other party (e.g. customer). In media-less mode it is the external CCP that is open in a separate tab that carries the audio connection which is unaffected by the reload of the embedded softphone within Zendesk.

This enhancement enabled us to refactor the embedded softphone in such a way that it seamlessly “survives” page reloads and app refreshes. Call processing and ticket assignment logic continues as if the reload didn't happen.

5.5.3 Multi-tab handling

This enhancement addresses a number of issues that may arise when handling a call while having the Zendesk Support app open in multiple tabs/windows simultaneously.

Previously, each instance of the Zendesk app would have its own embedded CCP (softphone), unaware of potential other instances, thus duplicating the processing logic. This would at times result in duplicated tickets, users and ticket comments.

With the latest upgrade (v2.2) only the instance (window/tab) that first received (or initiated) the call will be processing it. All others will ignore any further events related to that call. If the call processing tab is duplicated it's treated as a new tab and the call will continue to be processed in the original one. It's important not to close the call processing tab or its window. If this happens, try to reopen it (eg. CTRL+SHIFT+T / CTRL+SHIFT+N in Chrome).

6 User guide

This section will describe the features and functions that are specific to the Amazon Connect app for Zendesk. The user should refer to the [Amazon Connect User Guide](#) (page 321 and onwards) for detailed information on use of the Amazon Connect softphone.

When you first log in to your Zendesk instance and click on the Amazon Connect app on the top bar you will be redirected to the Amazon Connect sign in screen. Once you type in your credentials and have successfully signed in the Amazon Connect tab will automatically close. The Connect softphone will load in Zendesk.

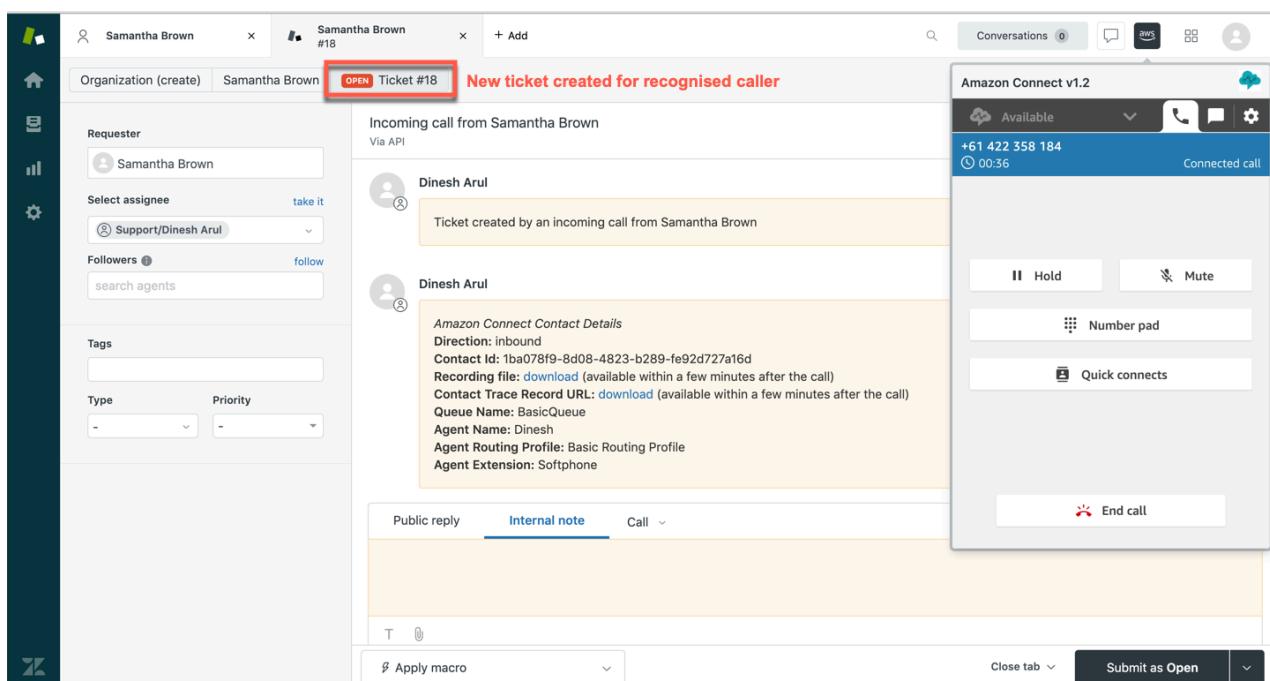
 Make sure you enable pop-ups and allow the use of the microphone

6.1 Inbound calls (auto assignment)

The following apply when the `ticket_assignment` attribute has been set to `auto` in your contact flow. If the `ticket_assignment` attribute has not been set within your contact flow, it will default to `auto`.

6.1.1 Recognised caller

If an agent answers a call from a recognised number, a new ticket is automatically created and attached to this user.



 If the call is related to an existing ticket, the agent can merge the newly created ticket into the existing one.

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6.1.2 Unrecognised caller

If an agent answers a call from an unrecognised number, a new user is created with the unrecognised number attached to it and a new ticket is attached to this user.

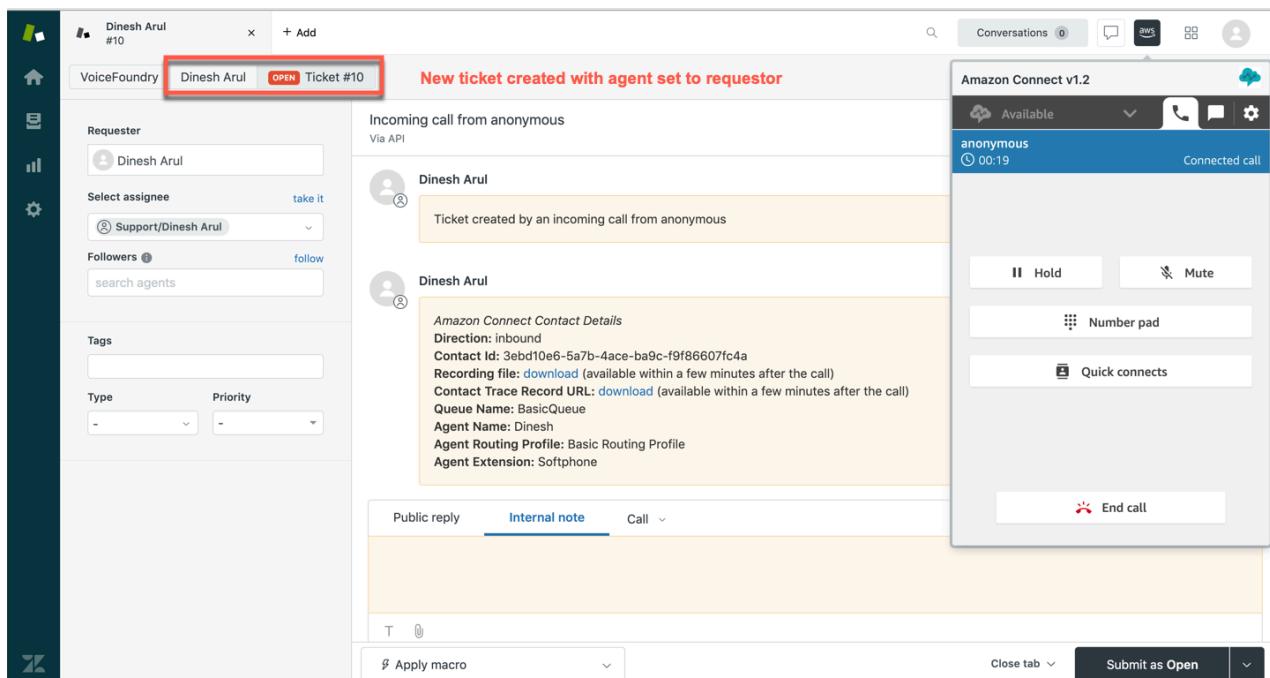
The screenshot shows the Zendesk interface for creating a new organization. A red box highlights the status bar message "new user at +61422358184 OPEN Ticket #11". Below this, a red box highlights the "Requester" section where the new user's phone number is listed. To the right, a modal window titled "New user and ticket created for unrecognised caller" displays "Incoming call from new user at +61422358184". It shows contact details for "Dinesh Arul" and a note: "Ticket created by an incoming call from new user at +61422358184". The Amazon Connect v1.2 interface is visible on the right, showing the call is connected to "+61 422 358 184" at 01:44.

The screenshot shows the Zendesk interface for viewing a user profile. A red box highlights the "Phone" field containing "+61422358184 (direct line)". To the right, a red arrow points to the "Requested tickets (1)" section, which lists an incoming call ticket from the same number. A red box highlights the ticket ID "#11". Above the ticket list, a red box highlights the phone number "+61 422 358 184" in the Amazon Connect v1.2 interface. A red annotation text "Phone number automatically added to new user's profile" is overlaid on the screen.

- i If the caller is an existing user, the agent will need to merge the newly created user into the existing one. If the call is related to existing ticket, the agent can merge the newly created ticket into the existing one.

6.1.3 Anonymous caller

If an agent answers a call from an anonymous/private number, a new ticket is automatically created with the agent as the requester. The agent can then either find an existing user or create a new one and change the ticket requester to that user.



6.1.4 Ticket number attribute

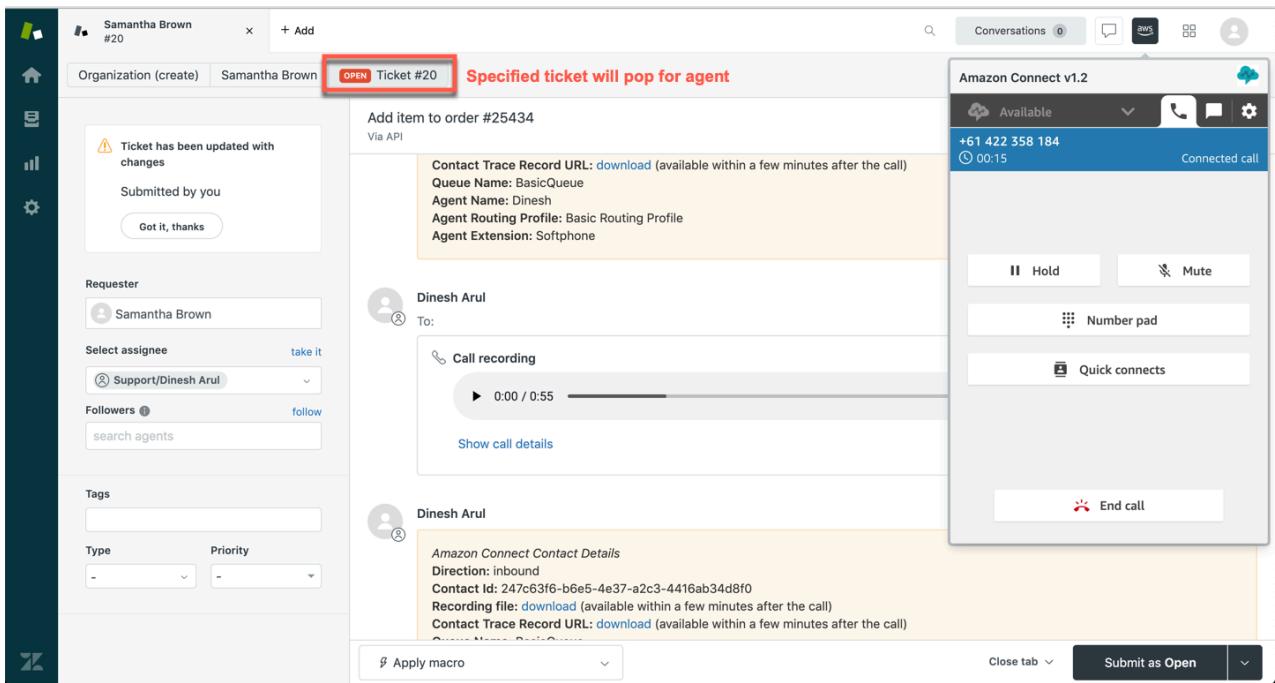
The `zendesk_ticket` attribute allows for callers to enter a ticket number within an IVR, and have that ticket pop for the agent when they answer the call.

The following apply if the `zendesk_ticket` attribute has been set in your contact flow.

Recognised caller

If an agent answers a call from a recognised number and the caller has entered a valid ticket number, the specified ticket will pop for the agent.

Amazon Connect App for Zendesk v2.2



If an agent answers a call from a recognised number and the caller has entered either an invalid ticket number or the ticket number does not match back to the caller, a new ticket is automatically created for the recognised caller.

Unrecognised caller

If an agent answers a call from an unrecognised number and the caller has entered a ticket number, a new user is created and a new ticket is attached to this user regardless of whether the caller entered a valid ticket number or not as we can't verify if the unrecognised caller is the actual requester of that ticket.

- i If the caller is an existing user, the agent will need to merge the newly created user into the existing one. If the call is related to existing ticket, the agent can merge the newly created ticket into the existing one.

Anonymous caller

If an agent answers a call from an anonymous number and the caller has entered a ticket number, a new ticket is automatically created with the agent as the requester regardless of whether the caller entered a valid ticket number or not as we can't verify that the anonymous caller is the actual requester of that ticket. The agent can then either find an existing user or create a new one and change the ticket requester to that user.

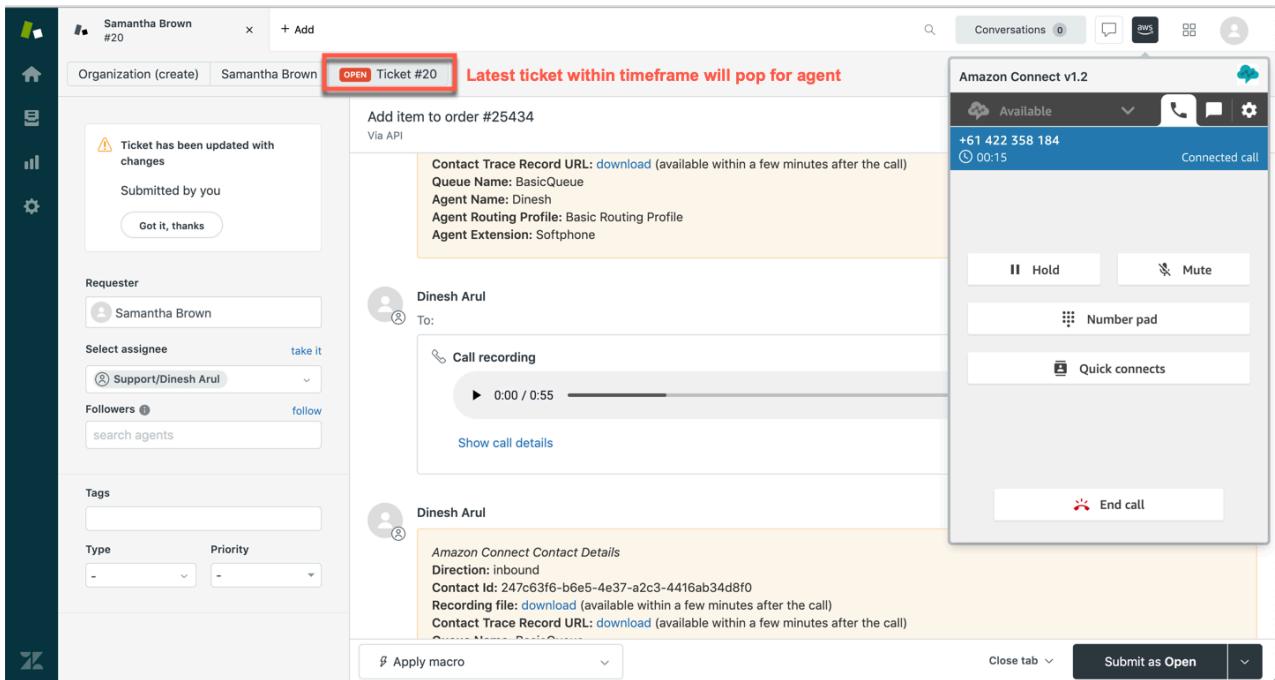
6.1.5 Recent ticket attribute

The recent_ticket_timeout attribute and create ticket after minutes app setting allows for a recent ticket of a recognised caller to pop for the agent instead of creating a new ticket. For example, if the recent_ticket_timeout attribute or create ticket after minutes app setting is set to 15, a new ticket will only be created if there hasn't been a ticket created or updated within the last 15 minutes for that recognised caller.

The following apply if the recent_ticket_timeout attribute has been set in your contact flow, or if the create ticket after minutes app setting has been set within the app's settings.

Recognised caller

If an agent answers a call from a recognised number and the caller has a recently created or updated ticket within the specified timeframe, then that latest ticket will pop for the agent.



If an agent answers a call from a recognised number and the caller has a recently created or updated ticket outside of the specified timeframe, then a new ticket is automatically created for the recognised caller.

- i If the call is related to an existing ticket, an agent can merge the newly created ticket into the existing one.

Unrecognised caller

If an agent answers a call from an unrecognised number a new user is created with the unrecognised number attached to it and a new ticket is attached to this user.

- i If the caller is an existing user, the agent will need to merge the newly created user into the existing one. If the call is related to existing ticket, the agent can merge the newly created ticket into the existing one.

Anonymous caller

If an agent answers a call from an anonymous number a new user is created with the agent as the requestor and a new ticket is attached to this user. The agent can then either find an existing user or create a new one and change the ticket requester to that user.

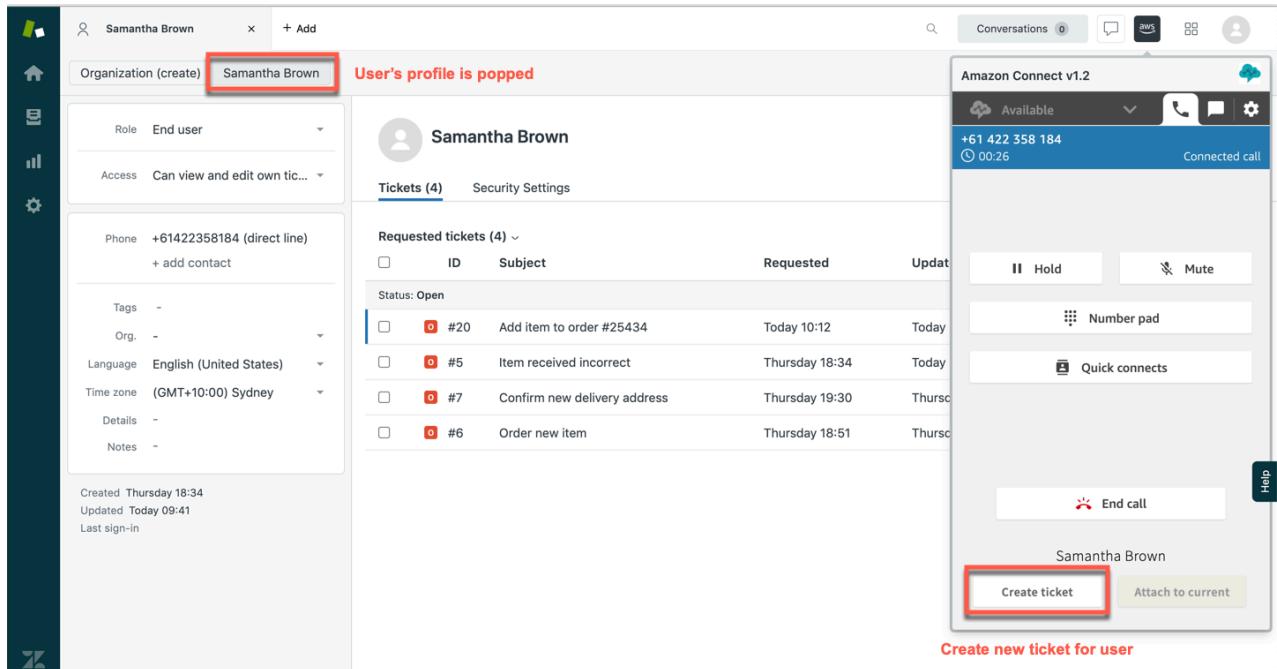
6.2 Inbound calls (manual assignment)

The following apply when the `ticket_assignment` attribute has been set to `agent` in your contact flow.

Amazon Connect App for Zendesk v2.2

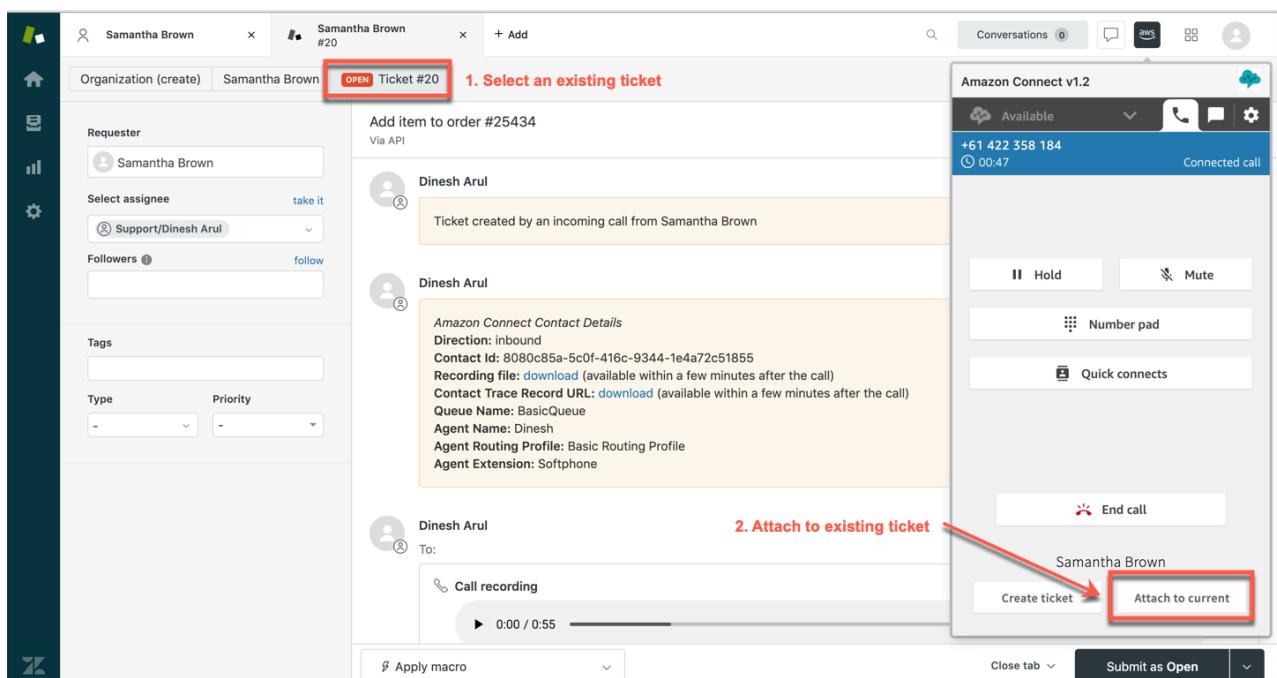
6.2.1 Recognised caller

If an agent answers a call from a recognised number, that user's profile is popped and the agent has the option of either clicking on the create ticket button to create a ticket for that user or if the call relates to one of the user's existing tickets the agent can open an existing ticket and then click on the attach to current button to attach the call to it.



The screenshot shows the Zendesk interface with the Amazon Connect app integrated. On the left, a sidebar shows user details for "Samantha Brown". A red box highlights the "Samantha Brown" tab in the top navigation bar. The main area displays "User's profile is popped" for Samantha Brown, showing her ticket history with 4 open requests. On the right, the Amazon Connect v1.2 interface is visible, showing a connected call with the phone number +61 422 358 184. A red box highlights the "Create ticket" button at the bottom of the ticket list. Below the ticket list, a red box highlights the "Attach to current" button.

Create new ticket for user



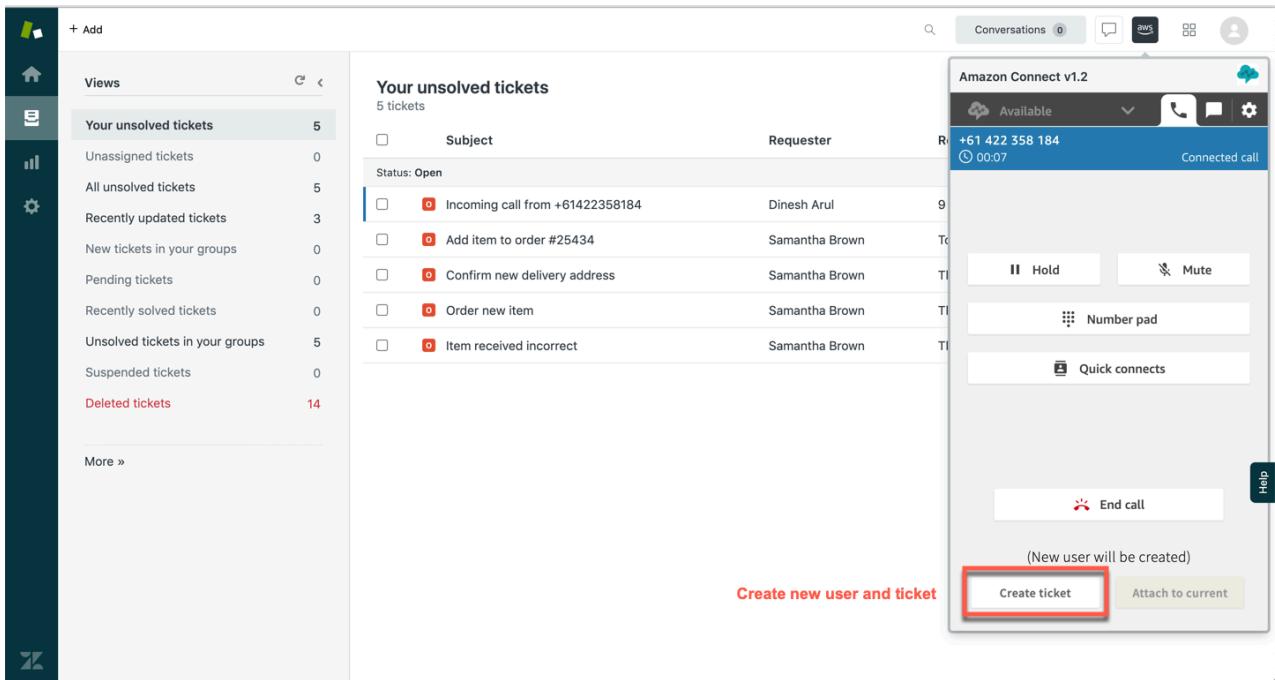
The screenshot shows the Zendesk interface with the Amazon Connect app integrated. On the left, a sidebar shows user details for "Samantha Brown". A red box highlights the "OPEN Ticket #20" button in the top navigation bar. The main area displays "1. Select an existing ticket" for Ticket #20, which was created by an incoming call from Samantha Brown. On the right, the Amazon Connect v1.2 interface is visible, showing a connected call with the phone number +61 422 358 184. A red box highlights the "Attach to current" button at the bottom of the ticket list. A red arrow points from the "2. Attach to existing ticket" label to the "Attach to current" button.

2. Attach to existing ticket

Amazon Connect App for Zendesk v2.2

6.2.2 Unrecognised caller

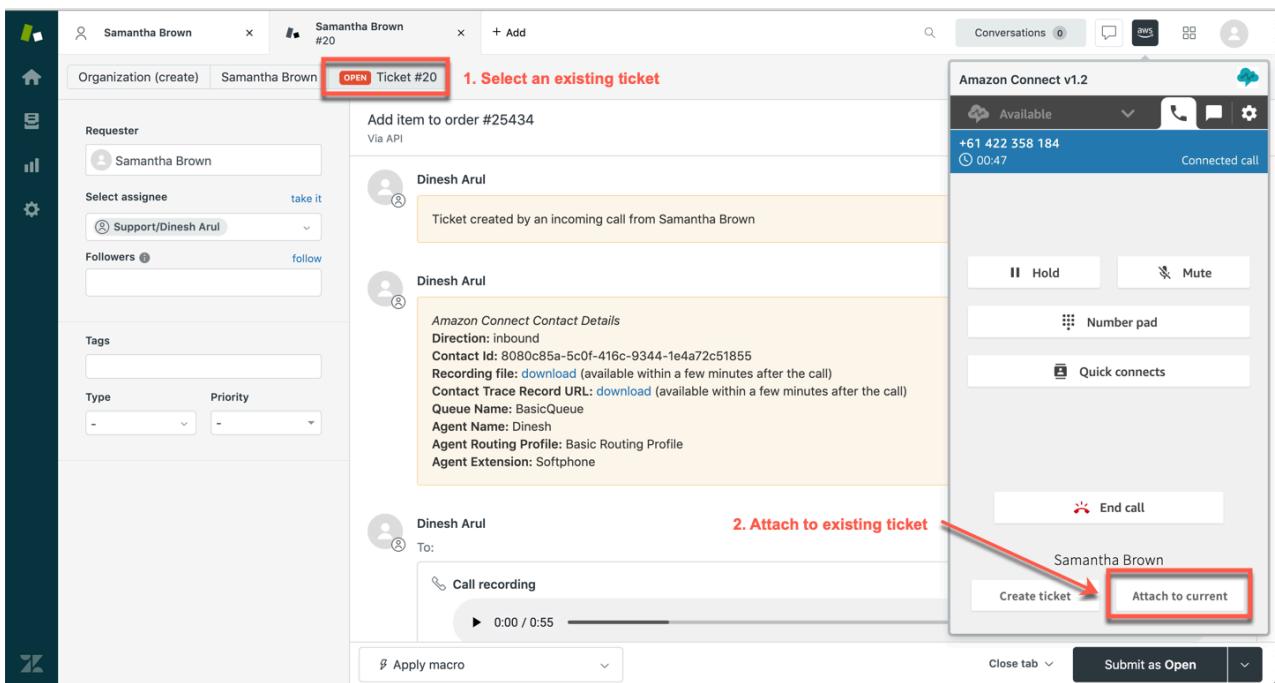
If an agent answers a call from an unrecognised number, the agent can click on the **create ticket** button to create a new user with the unrecognised number attached to it and a new ticket attached to this user.



Alternatively, the agent can first identify the caller and if they are an existing user the agent can navigate to the existing user's profile and click on the **create ticket** button to create a ticket for that user. The contact number is automatically added to the user's profile.

The agent may also establish if the call relates to one of the user's existing tickets and attach the call to it by opening the ticket and then clicking on the **attach to current** button. The contact number is automatically added to the user's profile.

Amazon Connect App for Zendesk v2.2



i It may take up to a few minutes for contact numbers to get automatically added to a user's profile.

6.2.3 Anonymous caller

If an agent answers a call from an anonymous number, the agent can click on the `create ticket` button to create a new ticket with the agent as the requester. The agent can then either find an existing user or create a new one and change the ticket requester to that user.

Amazon Connect App for Zendesk v2.2

The screenshot shows the Zendesk interface with the Amazon Connect app integrated. On the left, a sidebar displays ticket counts for various categories. The main area shows 'Your unsolved tickets' with 4 items, including 'Unassigned tickets' (0), 'All unsolved tickets' (9), and 'Recently updated tickets' (7). An active call from an anonymous user is shown in the top right, with options to Hold, Mute, or End call. A red box highlights the 'Create ticket' button in the call interface.

This screenshot shows a ticket creation dialog for 'Dinesh Arul'. The 'Requester' field is set to 'Dinesh Arul'. A red box highlights the 'Ticket #10' button. The right side of the screen shows the same call interface as the previous screenshot, with the 'Create ticket' button also highlighted by a red box. A message at the top of the ticket creation dialog says 'New ticket created with agent set to requestor'.

Alternatively, the agent can first identify the caller and if they are an existing user the agent can navigate to the existing user's profile and click on the create ticket button to create a ticket for that user.

The agent may also establish if the call relates to one of the user's existing tickets and attach the call to it by opening the ticket and then clicking on the attach to current button.

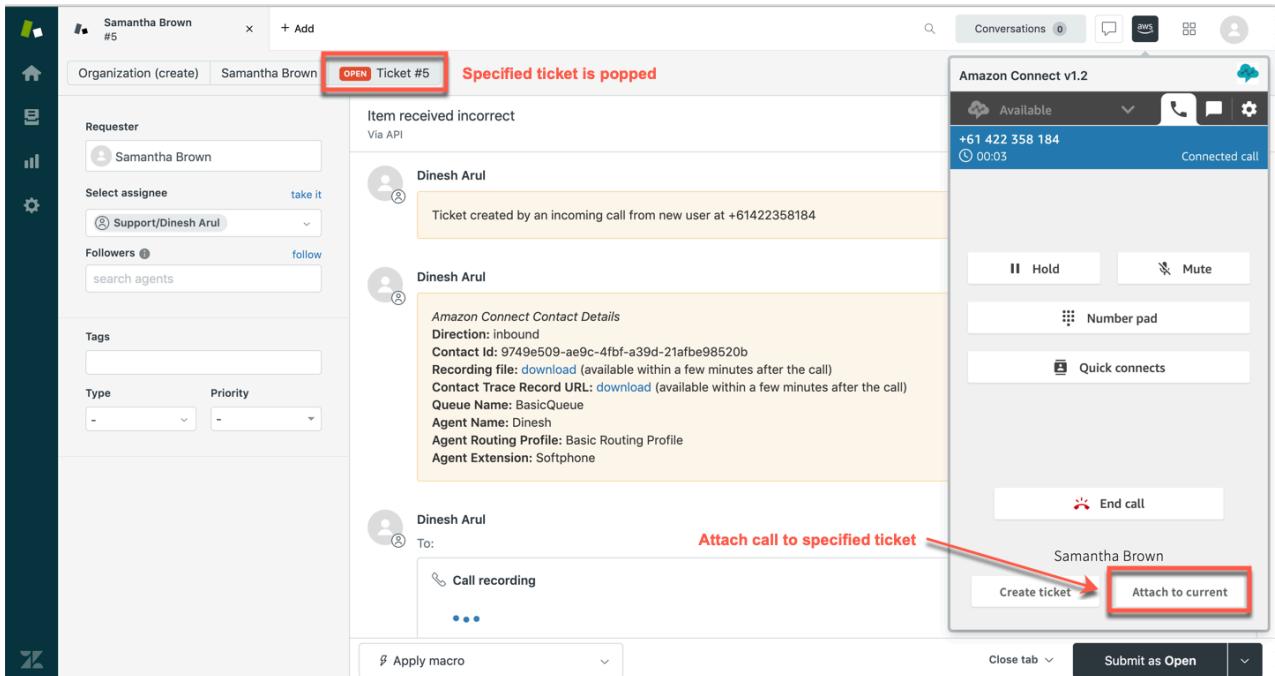
6.2.4 Ticket number attribute

The zendesk_ticket attribute allows for callers to enter a ticket number within an IVR, and have that ticket pop for the agent when they answer the call.

The following apply if the zendesk_ticket attribute has been set in your contact flow.

Recognised caller

If an agent answers a call from a recognised number and the caller has entered a valid ticket number, the specified ticket is popped and the agent can attach the call to it by clicking on the attach_to_current button.



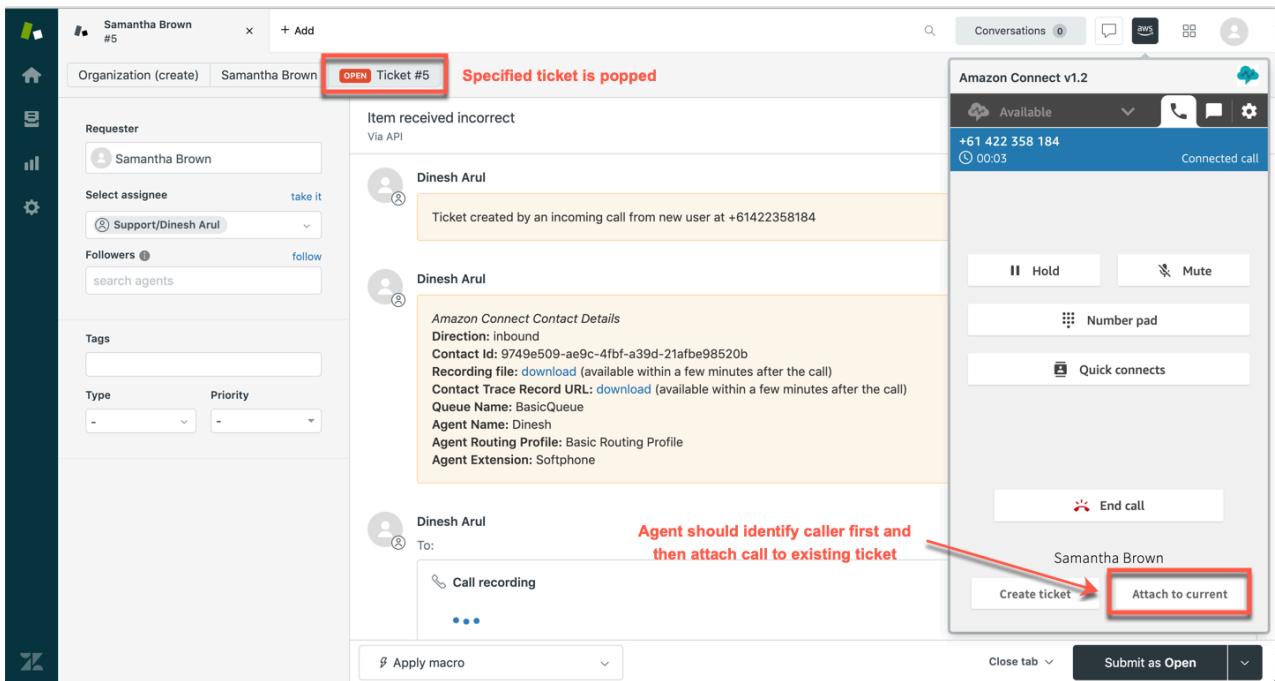
- i If the call is not related to the popped ticket, the agent can attach the call to a different ticket or create a new one by clicking on the create_ticket button.

If an agent answers a call from a recognised number and the caller has entered either an invalid ticket number or the ticket does not match back to the caller, that user's profile is popped and the agent has the option of either clicking on the create_ticket button to create a ticket for that user or if the call relates to one of the user's existing tickets the agent can open an existing ticket and then click on the attach_to_current button to attach the call to it.

Unrecognised caller

If an agent answers a call from an unrecognised number and the caller has entered a valid ticket number, the specified ticket is popped and the agent can then identify the caller and confirm they are an existing user and the quoted ticket belongs to them before clicking on the attach_to_current button. The contact number is automatically added to the user's profile.

Amazon Connect App for Zendesk v2.2



If the caller cannot be matched against the ticket or the ticket is not the intended one the agent can look for the correct ticket and user or create a new user within the Zendesk UI and then create a new ticket for that user by clicking on the `Create ticket` button.

If an agent answers a call from an unrecognised number and the caller has entered an invalid ticket number, no ticket or user profile is popped for the agent. The agent can click on the `Create ticket` button to create a new user with the unrecognised number attached to it and a new ticket attached to this user.

Alternatively, the agent can first identify the caller and if they are an existing user the agent can navigate to the existing user's profile and click on the `Create ticket` button to create a ticket for that user. The contact number is automatically added to the user's profile.

The agent may also establish if the call relates to one of the user's existing tickets and attach the call to it by opening the ticket and then clicking on the `Attach to current` button. The contact number is automatically added to the user's profile.

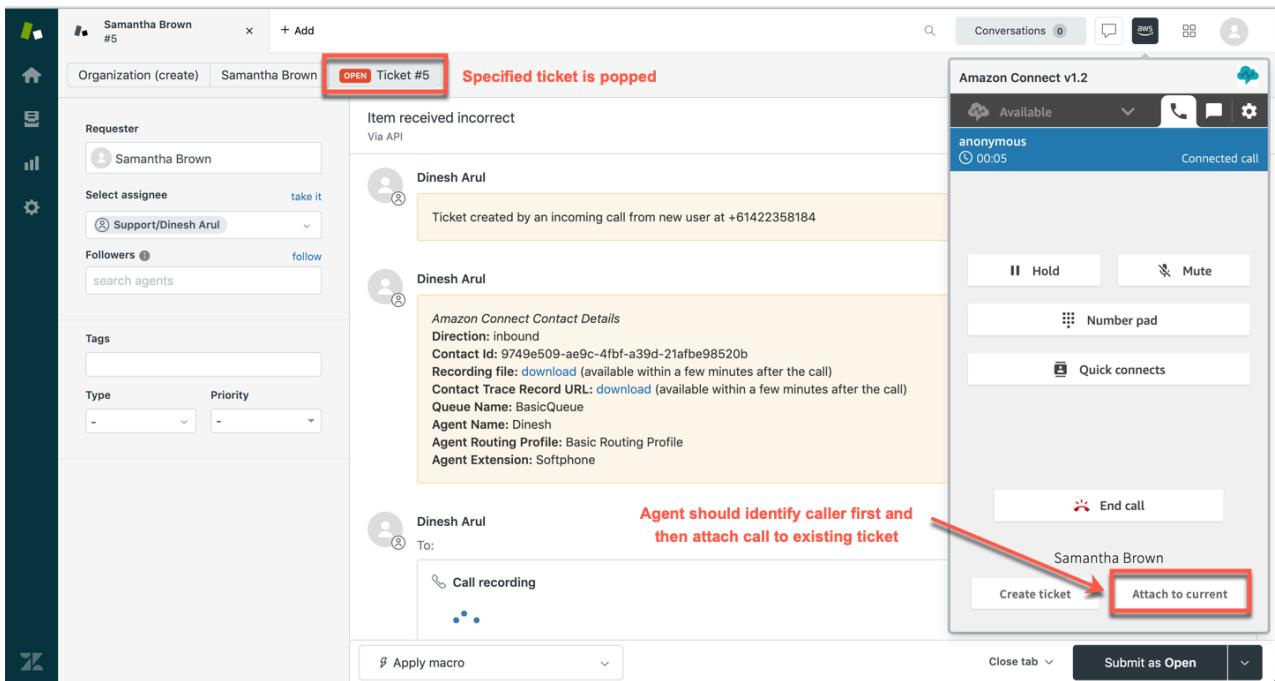


It may take up to a few minutes for contact numbers to get automatically added to the user's profile.

Anonymous caller

If an agent answers a call from an anonymous number and the caller has entered a valid ticket number, the specified ticket is popped and the agent can then identify the caller and confirm they are an existing user and the quoted ticket belongs to them before clicking on the `Attach to current` button.

Amazon Connect App for Zendesk v2.2



If the caller cannot be matched against the ticket or the ticket is not the intended one the agent can look for the correct ticket and user or create a new user within the Zendesk UI and then create a new ticket for that user by clicking on the `Create ticket` button.

If an agent answers a call from an anonymous number and the caller has entered an invalid ticket number, no ticket or user profile is popped for the agent. The agent can click on the `Create ticket` button to create a new user with the agent set to requestor and a new ticket attached to this user.

Alternatively, the agent can first identify the caller and if they are an existing user the agent can navigate to the existing user's profile and click on the `Create ticket` button to create a ticket for that user.

The agent may also establish if the call relates to one of the user's existing tickets and attach the call to it by opening the ticket and then clicking on the `Attach to current` button.

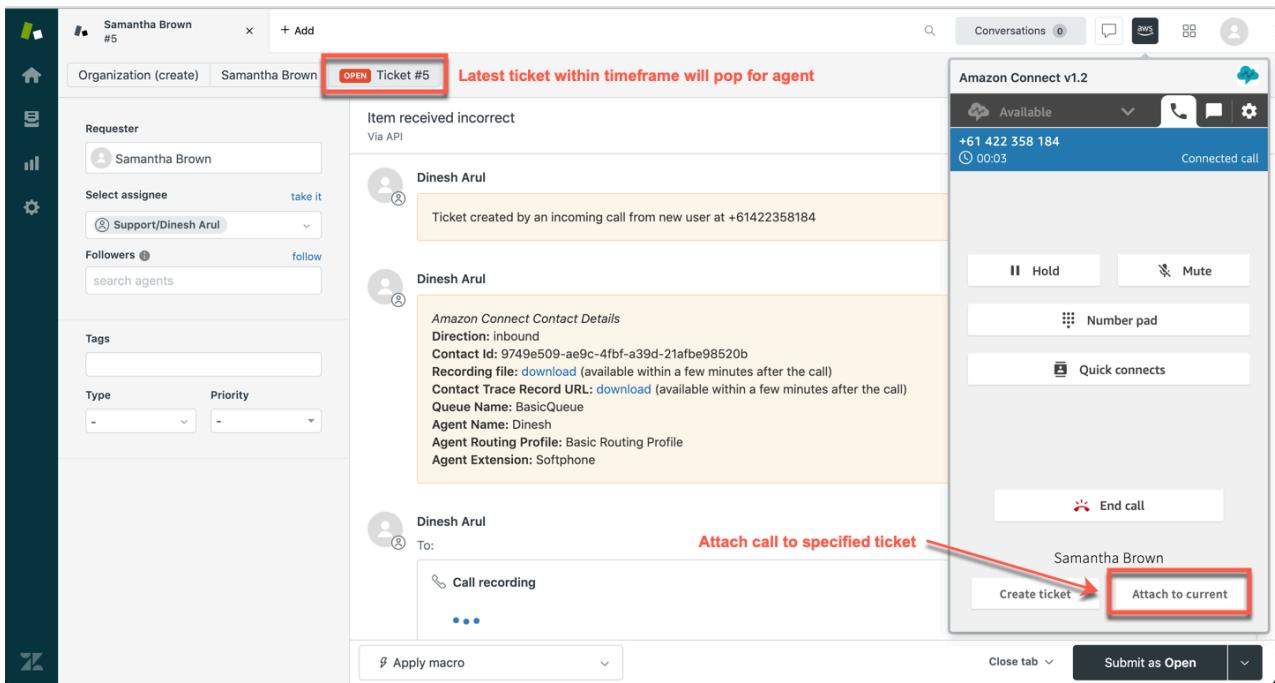
6.2.5 Recent ticket attribute

The `recent_ticket_timeout` attribute and `create ticket after minutes` app setting allows for a recent ticket of a recognised caller to pop for the agent instead of creating a new ticket. For example, if the `recent_ticket_timeout` attribute or `create ticket after minutes` app setting is set to 15, a new ticket will only be created if there hasn't been a ticket created or updated within the last 15 minutes for that recognised caller.

The following apply if the `recent_ticket_timeout` attribute has been set in your contact flow, or if the `create ticket after minutes` app setting has been set within the app's settings.

If an agent answers a call from a recognised number and the caller has a recently created or updated ticket within the specified timeframe, then that latest ticket is popped and the agent can attach the call to it by clicking on the `attach to current` button.

Amazon Connect App for Zendesk v2.2



- i If the call is not related to the popped ticket, the agent can attach the call to a different ticket or create a new one by clicking on the create ticket button.

If an agent answers a call from a recognised number and the caller has a recently created or updated ticket outside of the specified timeframe, that user's profile is popped and the agent has the option of either clicking on the create ticket button to create a ticket for that user or if the call relates to one of the user's existing tickets the agent can open an existing ticket and then click on the attach to current button to attach the call to it.

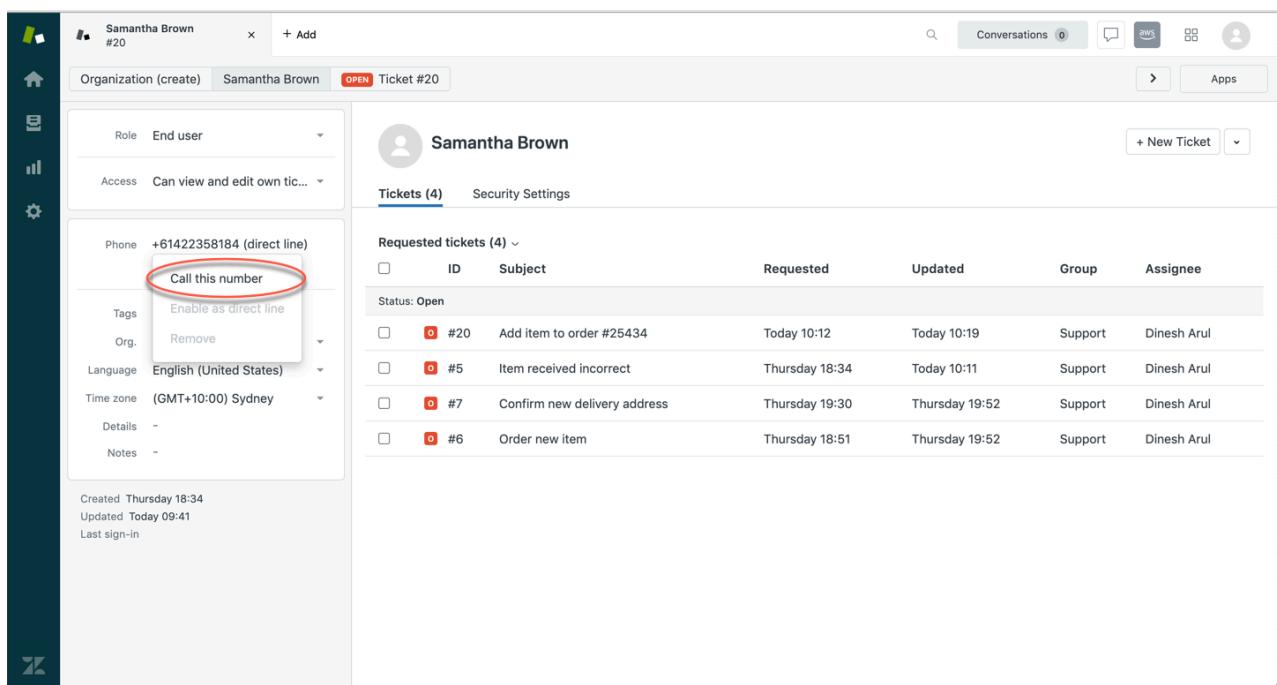
6.3 Outbound calls (auto assignment)

The following apply when the `ticket_assignment` attribute has been set to `auto` in your contact flow. If the `ticket_assignment` attribute has not been set within your contact flow, it will default to `auto`.

6.3.1 Zendesk user profile

To make an outbound call from a user profile, click on the user's phone number and select `call this number`. A new ticket will automatically be created for that user.

Amazon Connect App for Zendesk v2.2



Samantha Brown #20 + Add

Organization (create) Samantha Brown OPEN Ticket #20

Role End user

Access Can view and edit own tic...

Phone +61422358184 (direct line)

Tags Enable as direct line

Org. Remove

Language English (United States)

Time zone (GMT+10:00) Sydney

Details -

Notes -

Created Thursday 18:34
Updated Today 09:41
Last sign-in

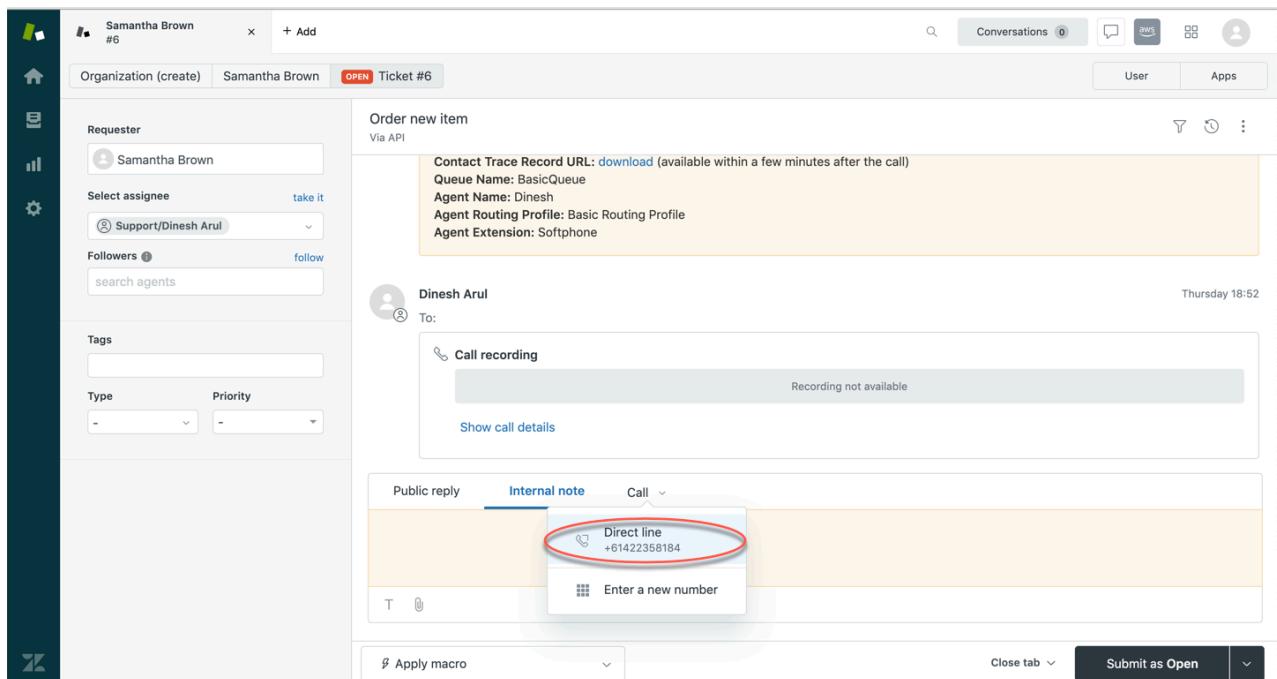
Tickets (4) Security Settings

Requested tickets (4) ▾

ID	Subject	Requested	Updated	Group	Assignee
#20	Add item to order #25434	Today 10:12	Today 10:19	Support	Dinesh Arul
#5	Item received incorrect	Thursday 18:34	Today 10:11	Support	Dinesh Arul
#7	Confirm new delivery address	Thursday 19:30	Thursday 19:52	Support	Dinesh Arul
#6	Order new item	Thursday 18:51	Thursday 19:52	Support	Dinesh Arul

6.3.2 Zendesk ticket

To make an outbound call from a ticket, click on call and then select direct line. The call will be attached to the selected ticket.



Samantha Brown #6 + Add

Organization (create) Samantha Brown OPEN Ticket #6

Requester Samantha Brown

Select assignee take it

Followers follow search agents

Tags

Type Priority

Order new item Via API

Contact Trace Record URL: download (available within a few minutes after the call)
Queue Name: BasicQueue
Agent Name: Dinesh
Agent Routing Profile: Basic Routing Profile
Agent Extension: Softphone

Dinesh Arul To: Thursday 18:52

Call recording Recording not available Show call details

Public reply Internal note Call

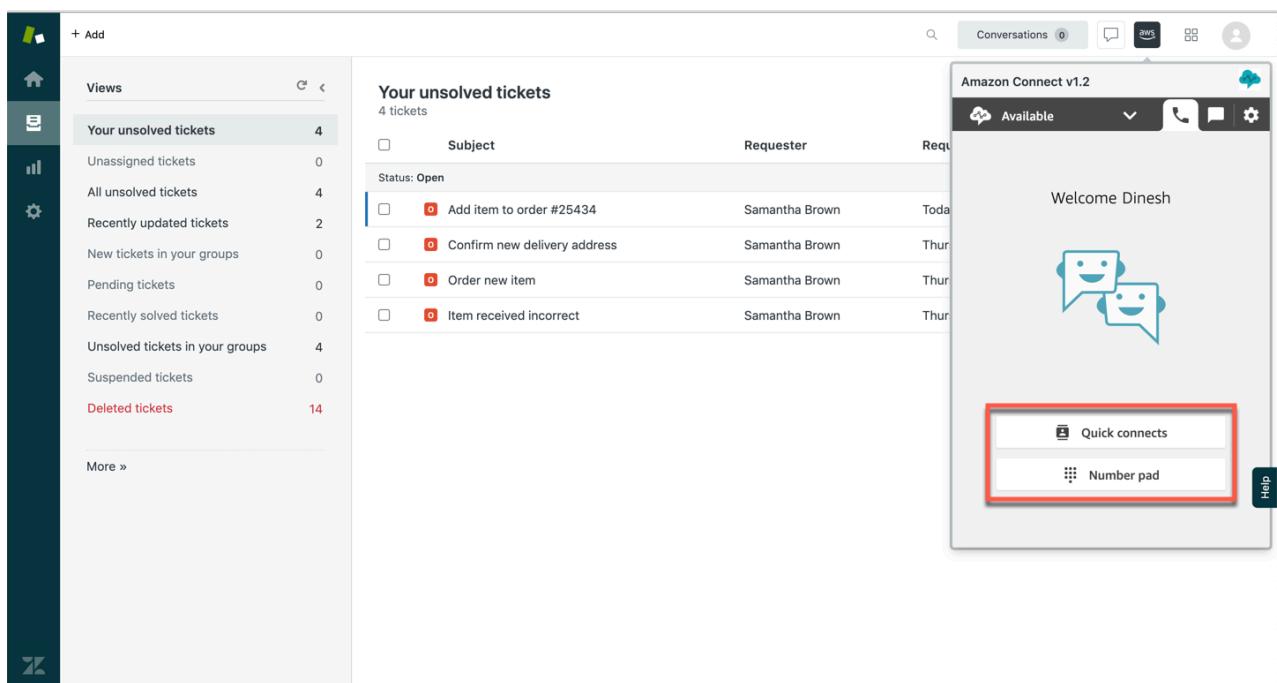
Direct line +61422358184

Enter a new number

Apply macro Close tab Submit as Open

6.3.3 Connect softphone

To make an outbound call from the Connect softphone, initiate the call via the dial pad or Quick Connects.



Recognised number

If it is a recognised number a new ticket will automatically be created for that user.

Unrecognised number

If it is an unrecognised number, nothing happens. The call is not attached to any new or existing ticket.

6.4 Outbound calls (manual assignment)

The following apply when the `ticket_assignment` attribute has been set to `agent` in your Amazon Connect contact flow.

6.4.1 Zendesk user profile

To make an outbound call from a user profile, click on the user's phone number and select `call this number`. The agent then has the option of either clicking on the `create ticket` button to create a ticket for that user, or if the call relates to one of the user's existing tickets the agent can open an existing ticket and then click on the `attach to current` button to attach the call to it.

Amazon Connect App for Zendesk v2.2

Samantha Brown #20

Organization (create) Samantha Brown OPEN Ticket #20

Role End user

Access Can view and edit own tic...

Phone +61422358184 (direct line)

- [Call this number](#)
- [Enable as direct line](#)
- [Remove](#)

Tags -

Org. -

Language English (United States)

Time zone (GMT+10:00) Sydney

Details -

Notes -

Created Thursday 18:34
Updated Today 09:41
Last sign-in

Tickets (4) Security Settings

Requested tickets (4) ▾

<input type="checkbox"/>	ID	Subject	Requested	Updated	Group	Assignee
<input type="checkbox"/>	#20	Add item to order #25434	Today 10:12	Today 10:19	Support	Dinesh Arul
<input type="checkbox"/>	#5	Item received incorrect	Thursday 18:34	Today 10:11	Support	Dinesh Arul
<input type="checkbox"/>	#7	Confirm new delivery address	Thursday 19:30	Thursday 19:52	Support	Dinesh Arul
<input type="checkbox"/>	#6	Order new item	Thursday 18:51	Thursday 19:52	Support	Dinesh Arul

Outgoing call to Sa... #32

Samantha Brown

Organization (create) Samantha Brown

Role End user

Access Can view and edit own tic...

Phone +61422358184 (direct line)

+ add contact

Tags -

Org. -

Language English (United States)

Time zone (GMT+10:00) Sydney

Details -

Notes -

Created Thursday 18:34
Updated 9 minutes ago
Last sign-in

Tickets (5) Security Settings

Requested tickets (5) ▾

<input type="checkbox"/>	ID	Subject	Requested	Upd...
<input type="checkbox"/>	#32	Outgoing call to Samantha Brown	9 minutes ago	9 mi...
<input type="checkbox"/>	#20	Add item to order #25434	Yesterday 10:12	Yester...
<input type="checkbox"/>	#5	Item received incorrect	Thursday 18:34	Thur...
<input type="checkbox"/>	#7	Confirm new delivery address	Thursday 19:30	Thur...
<input type="checkbox"/>	#6	Order new item	Thursday 18:51	Thur...

Amazon Connect v1.2

Available +61 422 358 184 00:24 Connected call

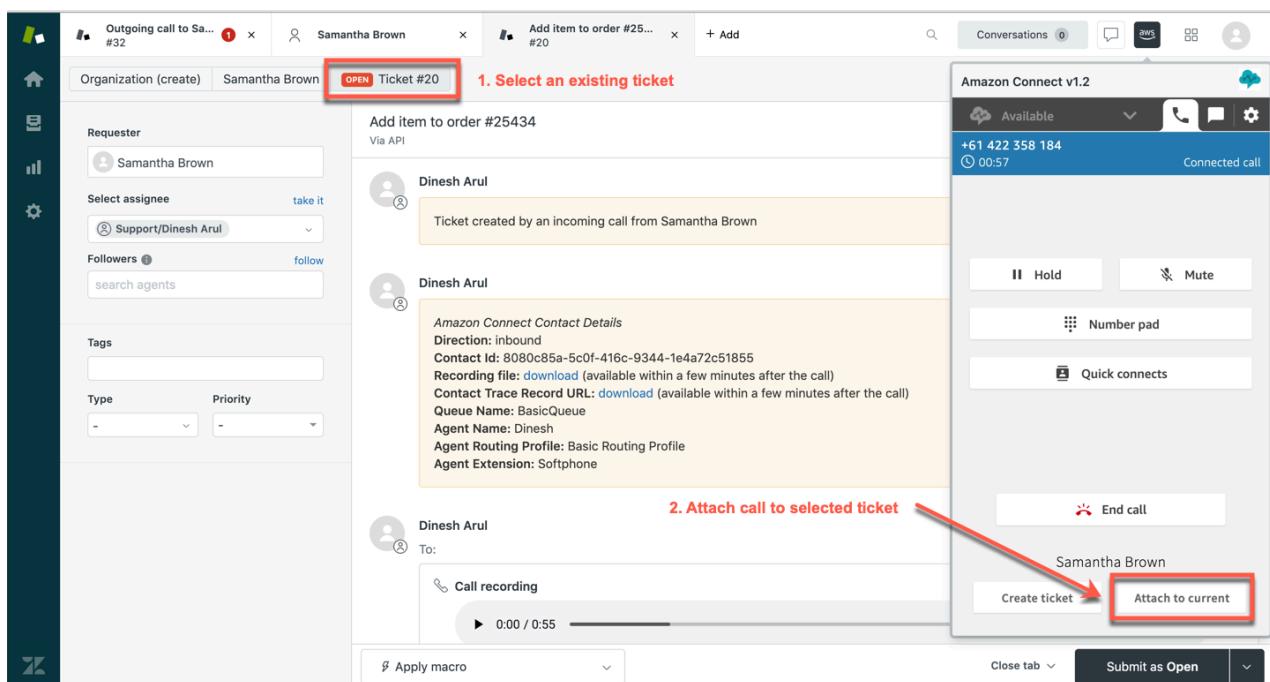
Hold Number pad Quick connects

End call

Samantha Brown

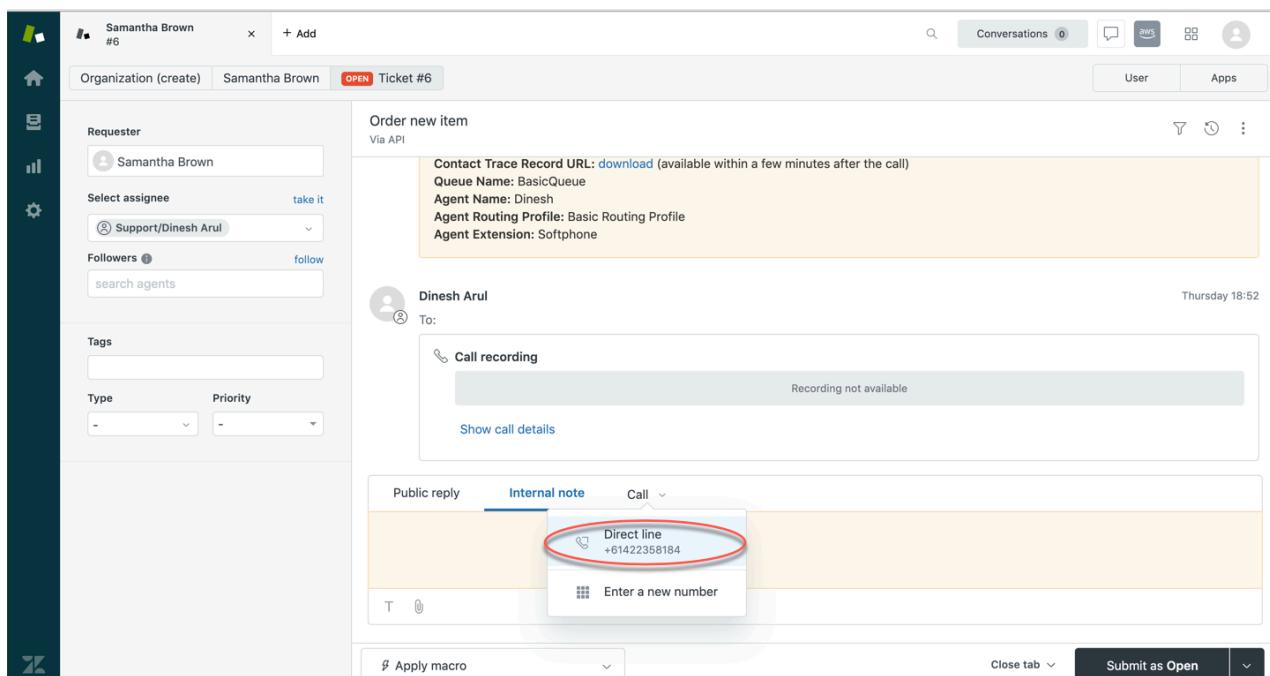
Create ticket for user Create ticket Attach to current

Amazon Connect App for Zendesk v2.2



6.4.2 Zendesk ticket

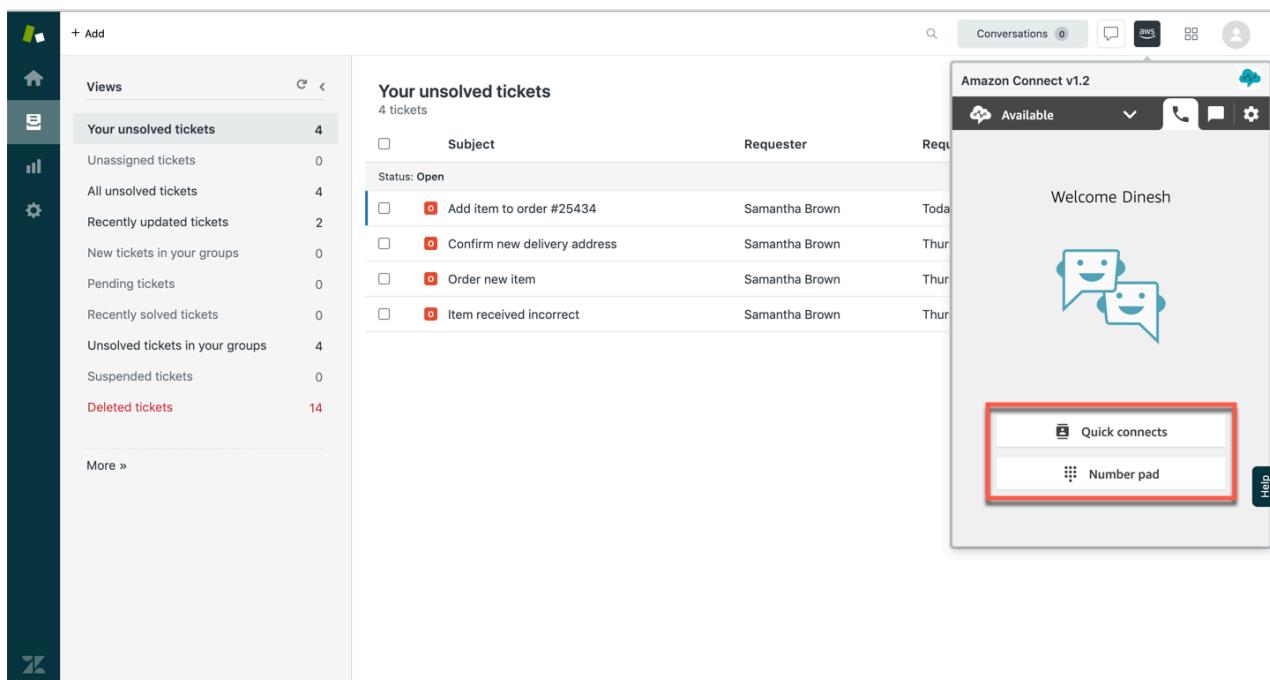
To make an outbound call from a ticket, click on call and then select direct line. The call will be attached to the selected ticket.



Amazon Connect App for Zendesk v2.2

6.4.3 Connect softphone

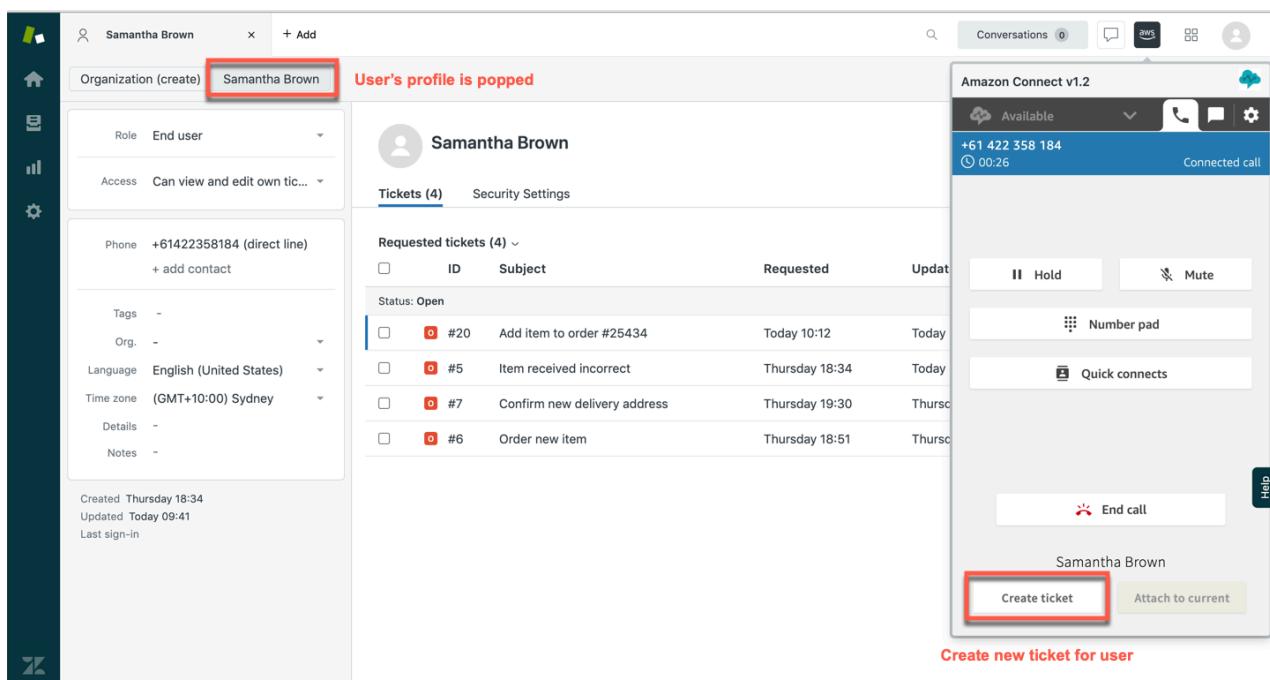
To make an outbound call from the Connect softphone, initiate the call via the dial pad or Quick Connects.



Recognised number

If it is a recognised number that user's profile is popped and the agent has the option of either clicking on the create ticket button to create a ticket for that user or if the call relates to one of the user's existing tickets the agent can open an existing ticket and then click on the attach to current button to attach the call to it.

Amazon Connect App for Zendesk v2.2



Unrecognised number

If it is an unrecognised number, nothing happens. The call is not attached to any new or existing ticket.

6.5 Agent to agent transfers

If the `ticket_assignment` attribute has been set to `auto`, when agent #1 transfers a call to agent #2 the call details for the transferred part of the call will get attached to the existing ticket that was created when agent #1 accepted the call.

If the `ticket_assignment` attribute has been set to `agent`, when agent #1 transfers a call to agent #2, one of the following will occur based on the action taken by agent #1:

1. If agent #1 has created a new ticket for the caller, the call details for the transferred part of the call will get attached to the ticket created by agent #1.
2. If agent #1 has attached the call to an existing ticket, the call details for the transferred part of the call will get attached to the existing ticket selected by agent #1.
3. If agent #1 has not created a new ticket or selected an existing ticket, agent #2 has the option to either create a new ticket or select an existing ticket for that caller. In this scenario only agent #2's call details will get attached to the ticket. The attribute `force_ticket_creation` will also need to be set to `false` for this to apply.

In the event of an error (e.g. indexing delay in Zendesk) where the ticket number was not successfully passed through to agent #2 and therefore no ticket is popped for agent #2, agent #2 will need to ask agent #1 for the appropriate ticket number and then attach the call to that ticket.

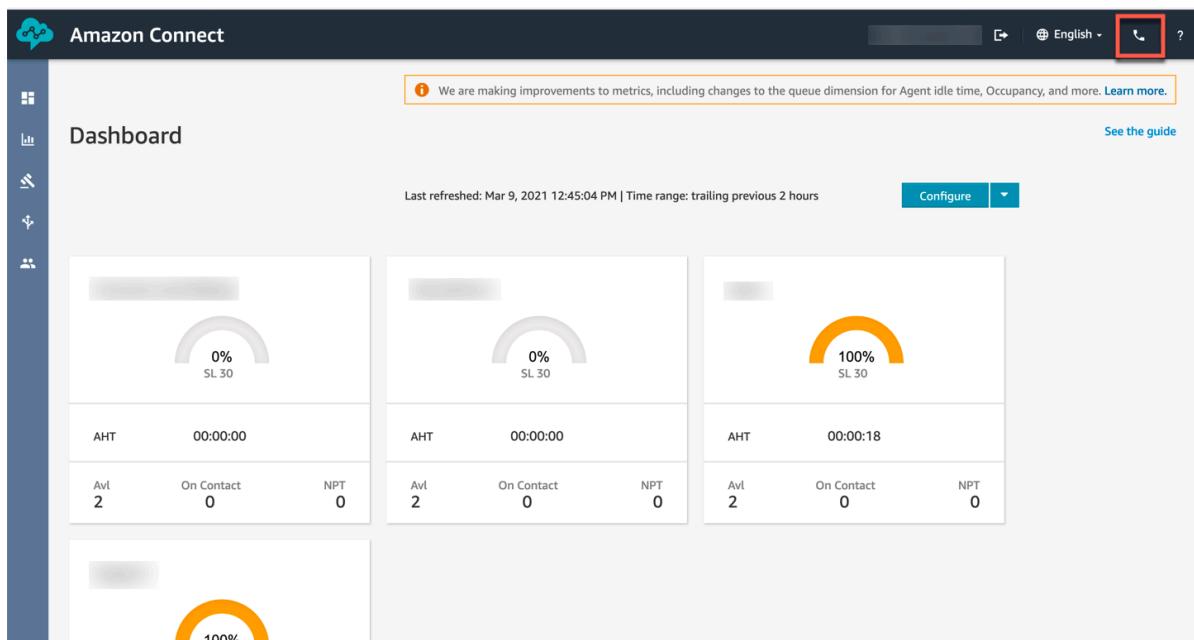
6.6 Using the app in media-less mode

If media-less mode has been enabled in your app's settings, follow the below instructions to correctly sign in to your Zendesk instance.

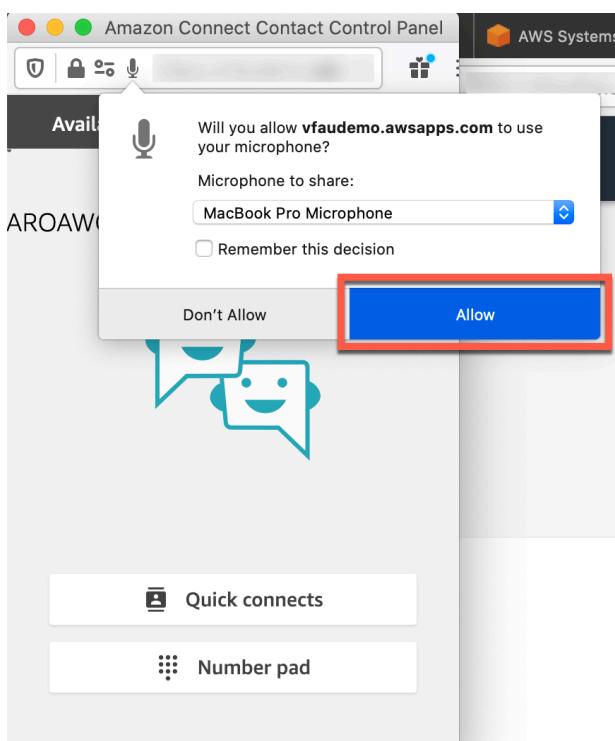
1. Open a tab in your browser and sign in to your Contact Control Panel (CCP).

Amazon Connect App for Zendesk v2.2

2. If the CCP does not automatically load for you and you are instead presented with the Connect console, click on the phone icon.



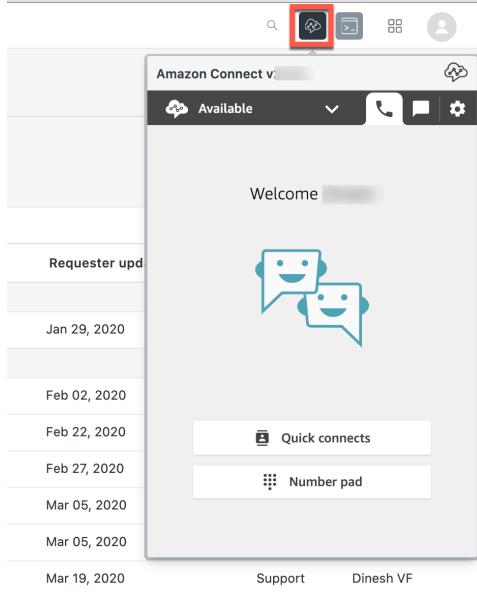
3. Make sure you allow the use of your microphone.



4. Open a new tab in your browser and sign in to your Zendesk instance.

Amazon Connect App for Zendesk v2.2

5. Click on the Connect app icon in the top right corner and you should see that you are already logged in. You are now set to receive inbound calls and make outbound calls. You do not need to use the CCP that is open in another tab, however you will need to keep this tab open whilst you are using the Connect app in Zendesk.



- i In the event you are unable to accept incoming calls or make outbound calls, clear your browser cache, then follow the above steps again.

7 FAQ

What happens if there are multiple user profiles that match the caller's CLI?	In the event there are multiple recognised users with the same phone number, the user which has the number as a direct line is selected and the other users are ignored.
Are Amazon Connect contact details added to every call?	Yes, Amazon Connect contact details are added to a ticket at the beginning of every call.
How are additional Connect attributes handled?	Additional attributes that are either updated or created during a call will be attached to the ticket at the end of the call.  The agent must still be on the call when an attribute is either updated or created for it to get attached to a ticket.
What happens if I refresh my browser during a call?	While your browser refreshes you will temporarily lose connection with the caller. Speech analysis (if enabled) will be lost.
What happens if a call ends before I create a ticket?	A new ticket will be created with call details and any other configured attributes attached to it.
What happens if the <i>default country dialling prefix</i> in the app's settings is set to one country code (e.g. +1), but the phone number in a user's profile includes another country code (e.g.+61)?	In this scenario the country code set in the <i>default country dialling prefix</i> app setting will be ignored.

8 Troubleshooting

Why isn't the Connect softphone loading in Zendesk?	If you have multiple installations of the Amazon Connect app, the URL advised in the softphone loading screen will be wrong (the earliest instead of the most recent one). Please remove all previous versions of the application within Zendesk, reload your browser, and then whitelist the displayed URLs in your AWS account for your Connect instance.
Why isn't the microphone working?	Ensure you have enabled pop ups and the use of your microphone in your browser for Zendesk.
Why isn't my speech analysis working?	Real-time speech analysis is only set up to work with option 2 (i.e. support) in the provided sample contact flow. Choosing option 1 (i.e. sales) will not activate speech analysis.
Why is the customer receiving two calls when I make an outbound call?	Make sure you turn off Zendesk Talk for agents otherwise an outbound call will be made from Connect and Talk.
Why is the app not working properly when I update the app's settings?	If you encounter this issue try refreshing your browser after updating the app's settings.
Why are some callers not being recognised by the app?	A caller will only be recognised if their user profile in Zendesk has their role set as <i>end user</i> . For example, if someone calls up and their user profile is set to Administrator or Team leader, the app will not pop the caller's user profile.
Why am I unable to accept a call or make an outbound call when media-less mode is enabled?	Chances are you have not signed in to the CCP in a separate tab on your browser before logging into Zendesk. Clear your browser cache for Zendesk, sign out of Zendesk, sign in to the CCP in a separate tab on your browser (ensure the CCP is open and not just the Connect console), then sign in to Zendesk.