

Amazon Connect App for Zendesk

Installation and User Guide

Version 2.1.2 [Feb 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](#).

The Amazon Connect app for Zendesk is only available to agents with “Talk - Partner Edition” seats (see zendesk.com/talk/pricing).

2 Amazon Connect app for Zendesk

The Amazon Connect app can:

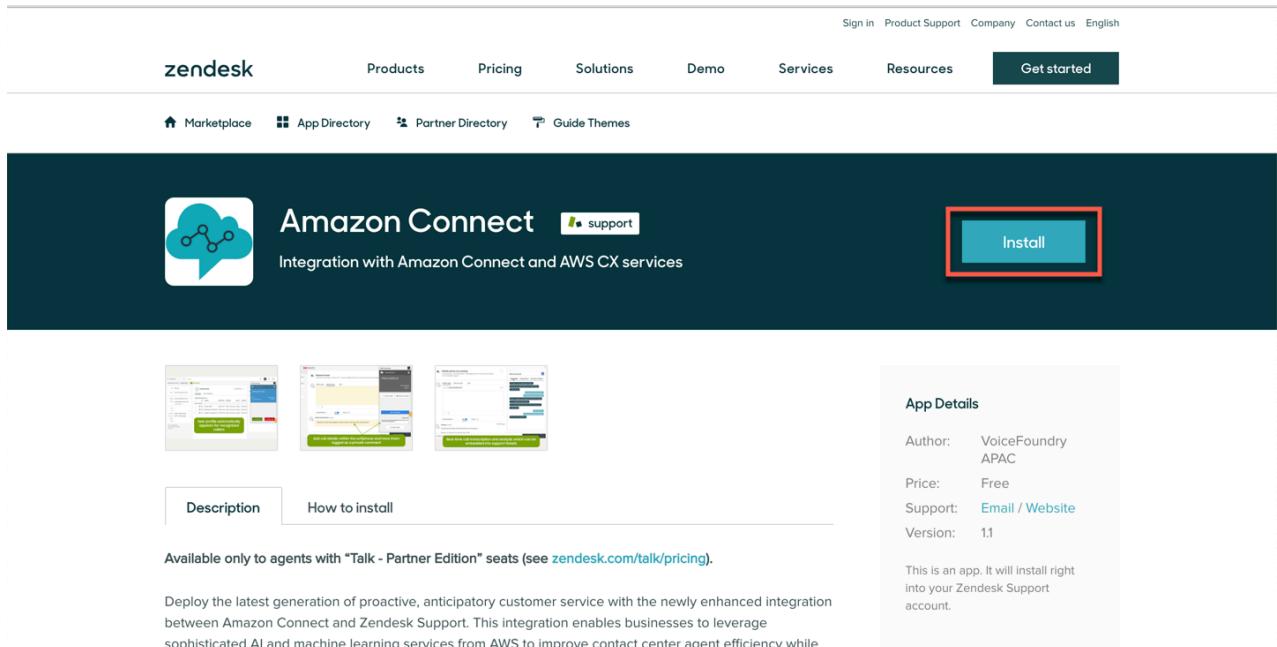
- Embed Amazon Connect's web-based softphone on the top bar of a Zendesk Support instance
- Link callers to a Zendesk Support user profile based on the caller's phone number
- Generate tickets or open existing tickets based on the outcome of call flows
- Pop a recent ticket of a recognised caller
- Automatically create a new ticket for each call
- View real-time transcription and speech analysis through Amazon Transcribe and Comprehend within a mini-app on the right side bar of a Zendesk Support instance
- Attach the following to a Zendesk Support ticket
 - Amazon Connect contact details
 - Call recording with audio playback and a download link
 - Advanced speech analysis

3 Installation guide

3.1 Installing the Amazon Connect app

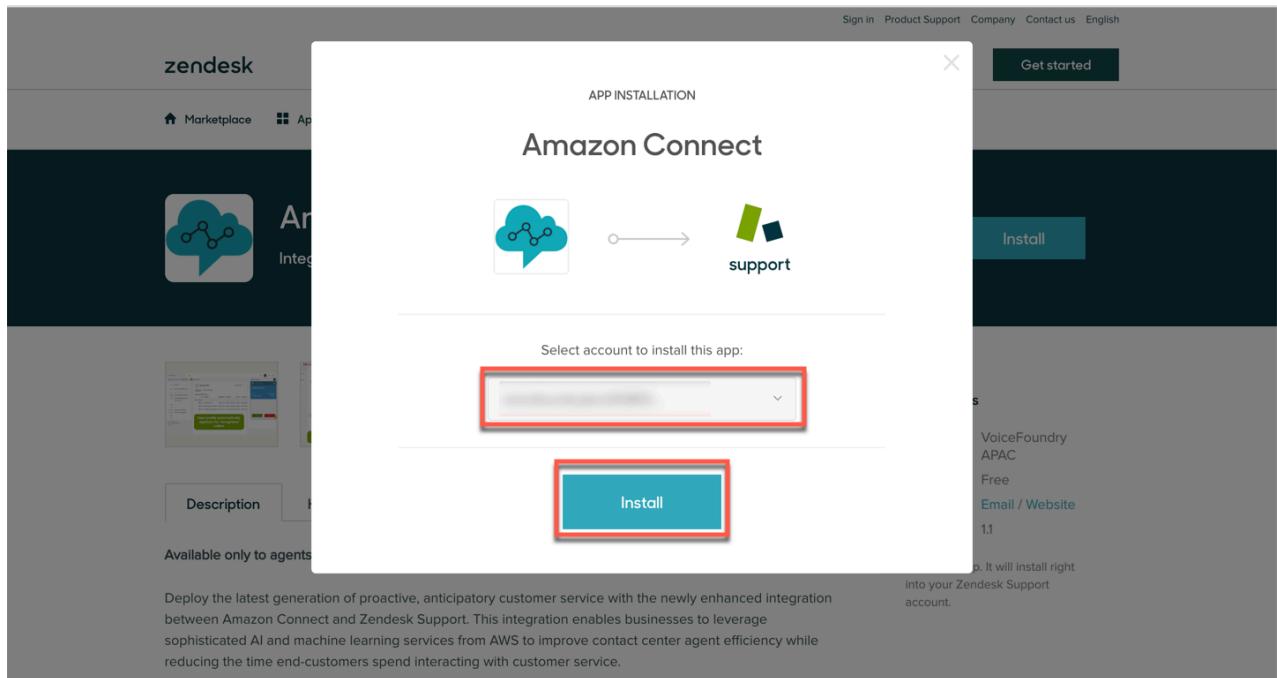
 You need to have administrator access in your AWS account in order to install the app.

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 is a main menu with categories: zendesk, Products, Pricing, Solutions, Demo, Services, Resources, and a prominent 'Get started' button. Underneath the main menu, there 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 of a cloud with a speech bubble, 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 highlighted with a red rectangular border. Below the app details, there are three small screenshots showing 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](#)).'. A detailed description follows, mentioning the integration between Amazon Connect and Zendesk Support, and how it leverages AI and machine learning. To the right of the app details, there's a sidebar titled 'App Details' containing information about the author (VoiceFoundry APAC), price (Free), support (Email / Website), and version (1.1). A note at the bottom of the sidebar says: '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.



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.



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://companyname.awsapps.com`

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).

Single sign-on url

If your Connect instance is configured with single sign-on (SSO) ask your administrator to provide you with the relevant URL to sign in. If you need to login manually leave this field blank.

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 overridden 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. 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 overriden by setting the `recent_ticket_timeout` attribute in your contact flow.

6. 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`

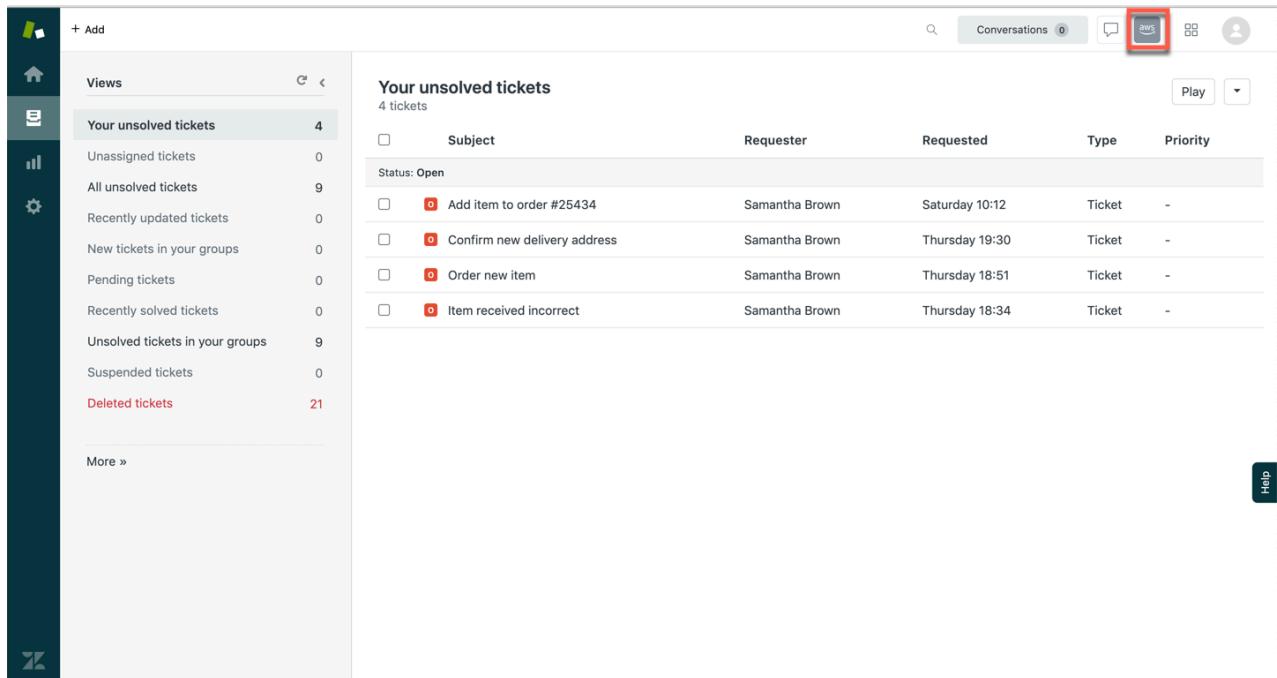
Once you have configured the app's settings click on install.

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

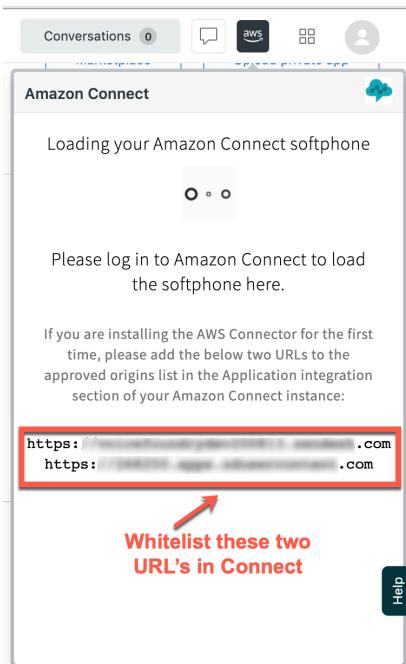
Install

3.3 Whitelist URL's in Connect

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



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



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 > Overview

- Overview
- Telephony
- Data storage
- Data streaming
- Application integration**
- Contact flows

Click on *add origin*.

Amazon Connect > Application integration

Approved origins

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

remove
remove
remove

+ Add origin

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

Add origin

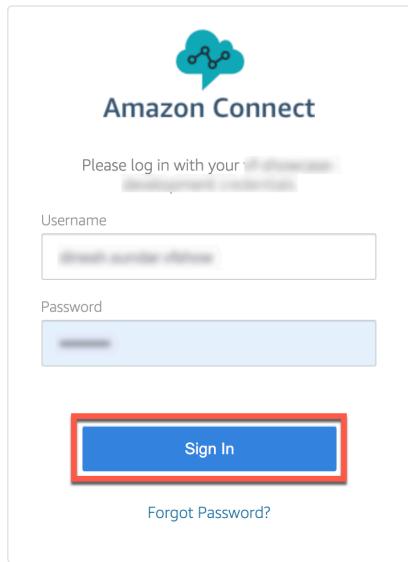
Enter origin URL

Ex. https://www.mydomain.com

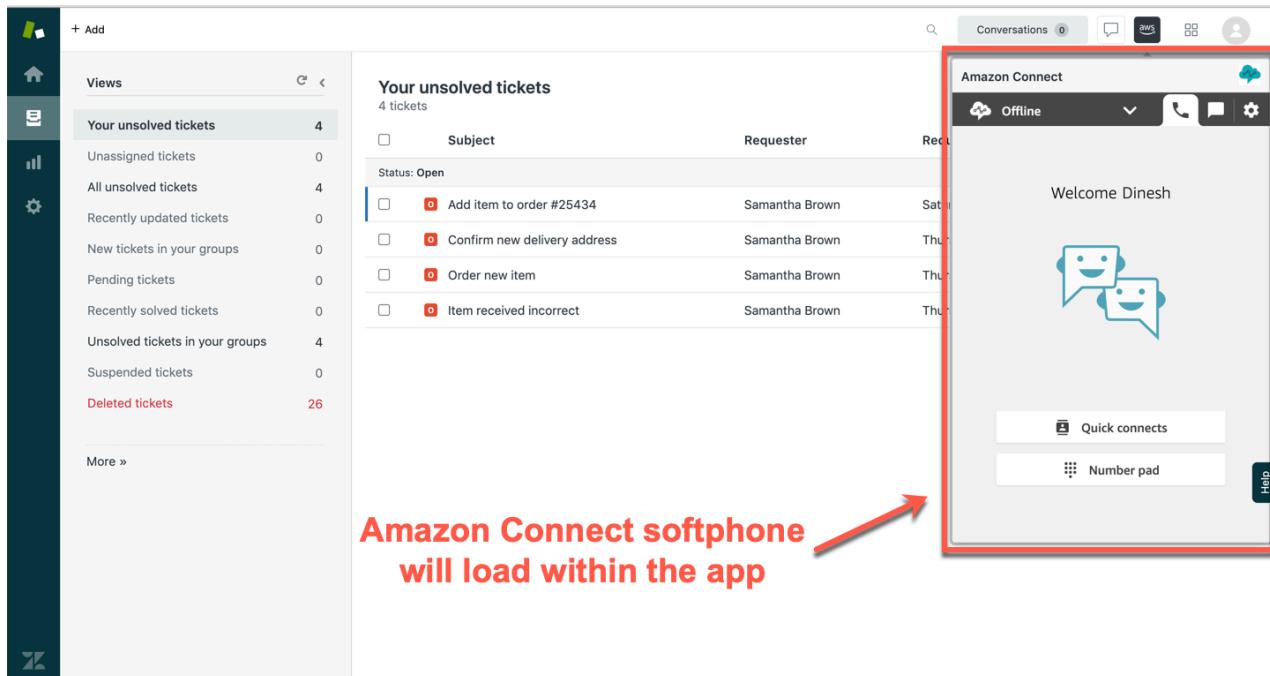
Cancel Add

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.



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

3.4 Enabling speech analysis (with DTMF)

Follow these steps to enable real-time advanced speech analysis and have the results attached to your tickets.



NOTE: pay-as-you-go charges apply for Amazon Transcribe and Amazon Comprehend if you enable advanced speech analysis.



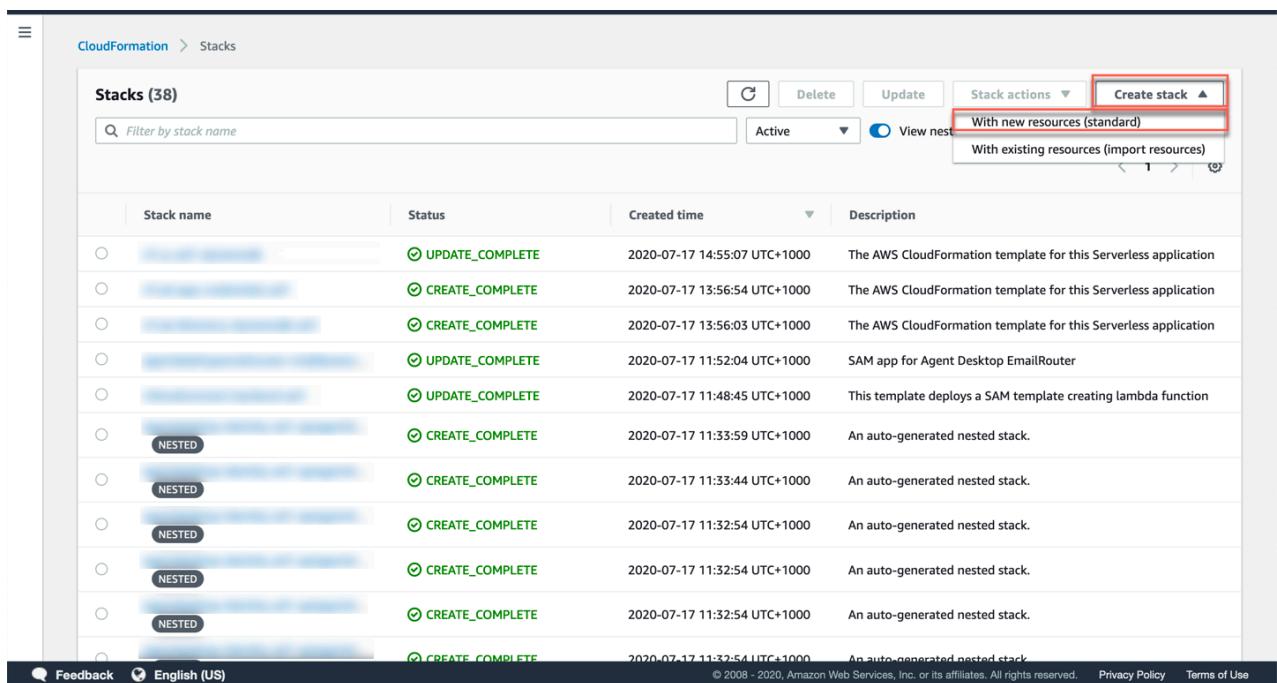
Real-time speech analysis is currently only available in the us-east-1, us-west-2 and ap-southeast-2.

3.4.1 Run the CloudFormation template

Download the [CloudFormation template](#).

Sign in to your AWS account, then go to CloudFormation. Click on *create stack with new resources*.

 Make sure you create a CloudFormation stack in the same region as your Connect instance.



The screenshot shows the AWS CloudFormation Stacks list page. At the top, there are buttons for Delete, Update, Stack actions (with options for With new resources (standard) and With existing resources (import resources)), and Create stack. The 'Create stack' button is highlighted with a red box. Below the buttons is a search bar labeled 'Filter by stack name' and a dropdown for 'Active'. There is also a 'View nested stacks' link. The main table lists 38 stacks, each with a status of 'CREATE_COMPLETE'. The table columns are Stack name, Status, Created time, and Description. The descriptions provide details about the templates used for different applications like Serverless and SAM. At the bottom of the page, there are links for Feedback, English (US), Privacy Policy, and Terms of Use.

Select *template is ready* and *upload a template file*, then click on *choose file*.

The screenshot shows the 'Create stack' wizard in the AWS CloudFormation console. The left sidebar shows steps: Step 1 (Specify template), Step 2 (Specify stack details), Step 3 (Configure stack options), and Step 4 (Review). The main area is titled 'Prerequisite - Prepare template'. It has three options: 'Template is ready' (selected), 'Use a sample template', and 'Create template in Designer'. Below this is the 'Specify template' section, which explains what a template is and provides a 'Template source' dropdown (set to 'Amazon S3 URL') and a 'Upload a template file' section with a 'Choose file' input field containing 'No file chosen'. A note says 'S3 URL: Will be generated when template file is uploaded'. At the bottom right are 'Cancel' and 'Next' buttons.

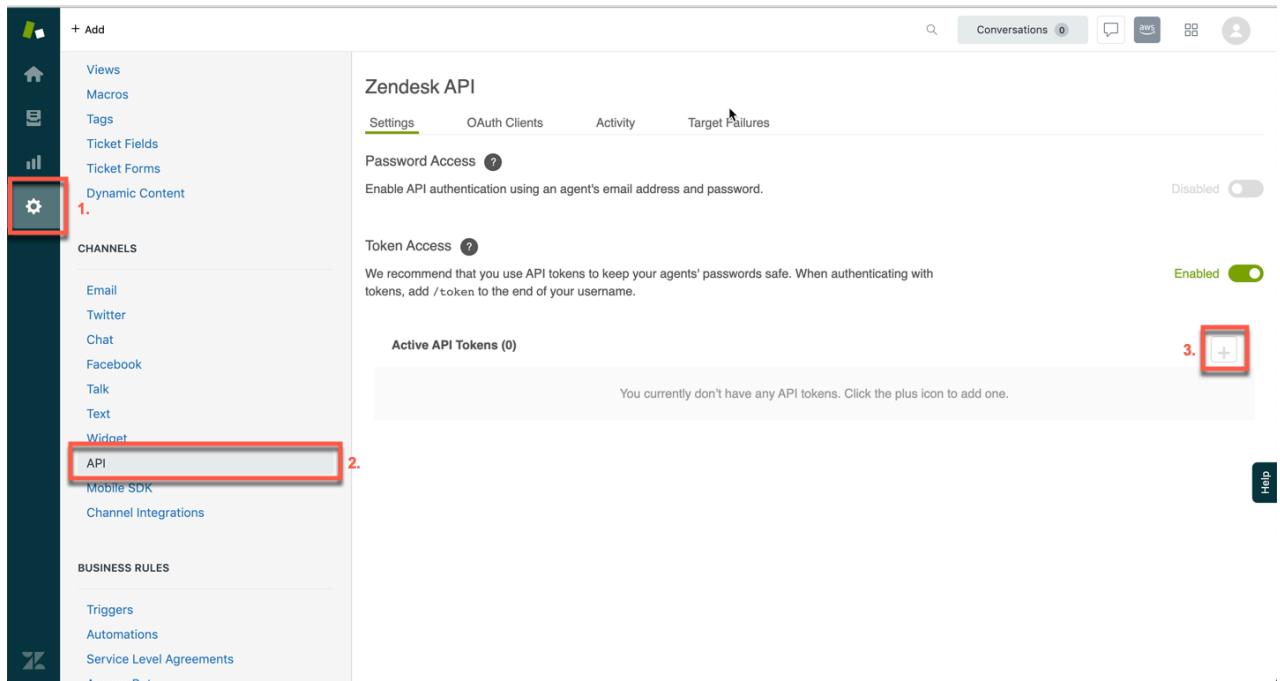
Select the CloudFormation template that you downloaded earlier and click on *open*.

Click *next*.

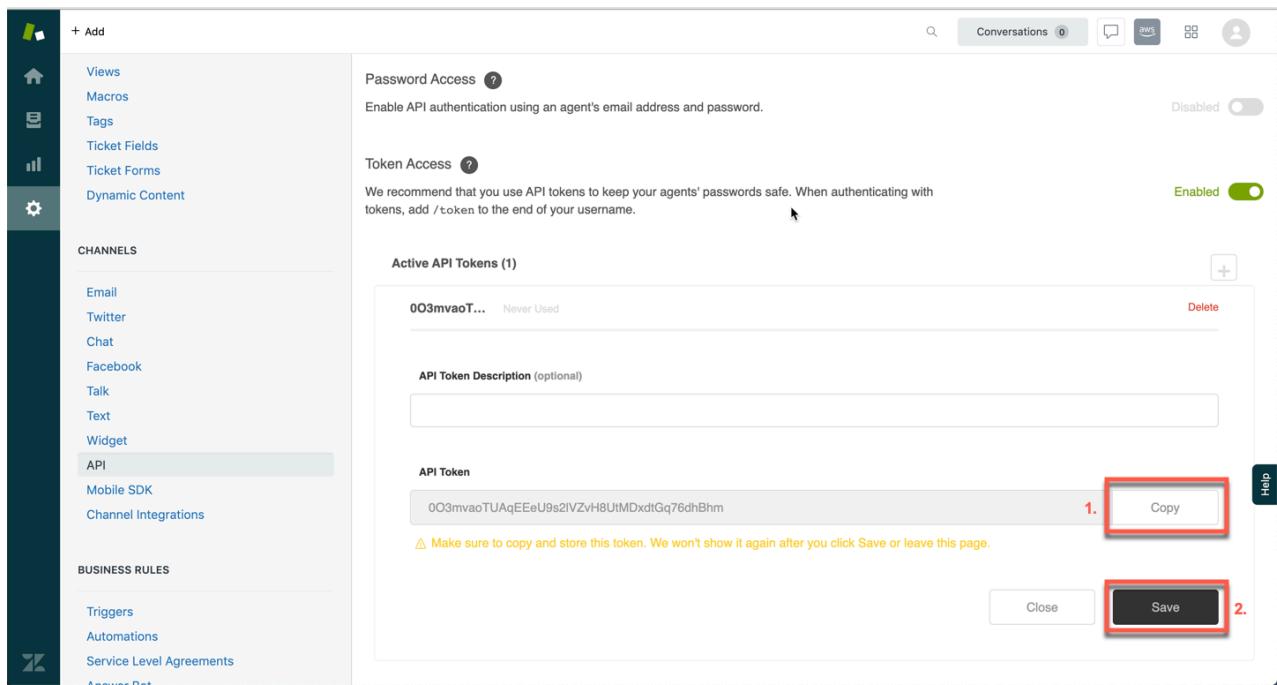
This screenshot shows the same 'Create stack' wizard after selecting a template. The 'Specify template' section now shows a 'Choose file' input field with 'AmazonConnect' selected. The 'Upload a template file' button is also highlighted with a red box. The 'Next' button at the bottom right is also highlighted with a red box.

Enter the following details:

1. Stack name: Must be a unique name.
2. S3 bucket name: S3 bucket name must be unique and not match any other S3 bucket names within your AWS account or the stack will fail.
3. Your Zendesk instance URL: Ensure the URL begins with *https://* and do not include */* at the end of the URL or the stack will fail.
4. Zendesk API token: To obtain an API token from Zendesk, go to your Zendesk instance. Click on the *admin* icon in the left navigation bar, and under *channels* select *API*. Click on the *add API* icon.



Click on copy, then click save.



Paste the API token in the Zendesk API Token field in your CloudFormation template.

5. Enter your email address. This needs to match the email address of the Zendesk Administrator who obtained the API token in step 4.

Click on *next*.

Amazon Connect App for Zendesk v2.1.2 - Installation and User Guide

Step 1
Specify template

Step 2
Specify stack details

Step 3
Configure stack options

Step 4
Review

Specify stack details

Stack name

Stack name
Enter a stack name
Stack name can include letters (A-Z and a-z), numbers (0-9), and dashes (-).

Parameters

Parameters are defined in your template and allow you to input custom values when you create or update a stack.

Amazon S3 Configuration

Call Audio Bucket Name
Enter the (globally unique) name you would like to use for the Amazon S3 bucket where we will store the audio files, and the sample contact flow. This template will fail to deploy if the bucket name you chose is currently in use.
2.

Zendesk Configuration

Zendesk URL Ex - <https://voicefoundry-aws-connect.zendesk.com>
Zendesk URL (<https://voicefoundry-aws-connect.zendesk.com>) The Zendesk instance needs to be created as a pre-requisite for this installation.
3.

Zendesk API Token
Zendesk Token with Admin privileges. This needs to be generated as a pre-requisite for this installation.
4.

Zendesk Admin Email ID
The Zendesk Admin Email ID for the selected Zendesk Instance
5.

Cancel Previous **Next**

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Click on next.

Step 1
Specify template

Step 2
Specify stack details

Step 3
Configure stack options

Step 4
Review

Configure stack options

Tags

You can specify tags (key-value pairs) to apply to resources in your stack. You can add up to 50 unique tags for each stack. [Learn more](#)

Key	Value

Add tag

Permissions

Choose an IAM role to explicitly define how CloudFormation can create, modify, or delete resources in the stack. If you don't choose a role, CloudFormation uses permissions based on your user credentials. [Learn more](#)

IAM role - optional
Choose the IAM role for CloudFormation to use for all operations performed on the stack.

IAM role name Sample-role-name Remove

Advanced options

You can set additional options for your stack, like notification options and a stack policy. [Learn more](#)

▶ Stack policy
Defines the resources that you want to protect from unintentional updates during a stack update.

▶ Rollback configuration
Specify alarms for CloudFormation to monitor when creating and updating the stack. If the operation breaches an alarm threshold, CloudFormation rolls it back. [Learn more](#)

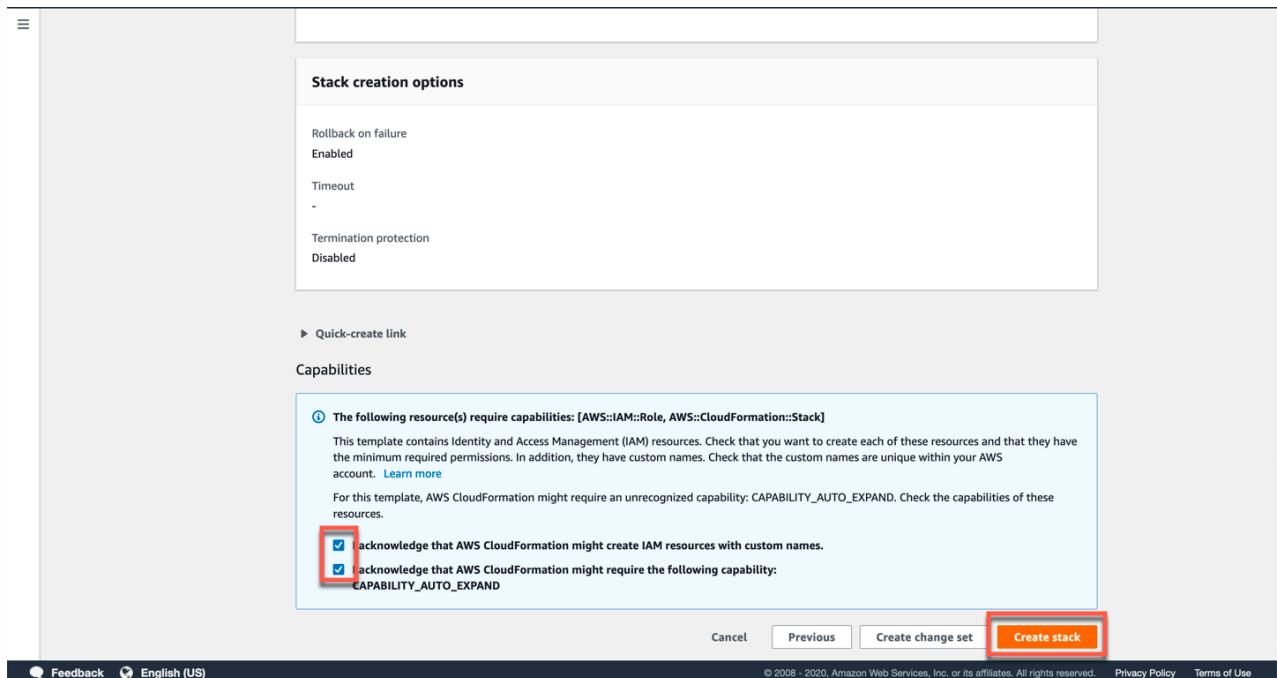
▶ Notification options

▶ Stack creation options

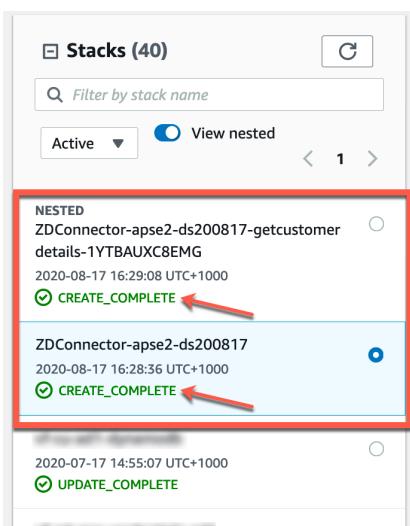
Cancel Previous **Next**

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Scroll to the bottom of the screen, select the two checkboxes and click *create stack*.



Once your stack has been successfully created (it usually takes a few minutes) you will see the below confirmation.



3.4.2 Whitelist lambda functions in Connect

In your AWS account, go to Amazon Connect and click on your Connect instance. Click on *contact flows* on the left hand menu.



Amazon Connect > [Select]

Overview

- [Telephony](#)
- [Data storage](#)
- [Data streaming](#)
- [Application integration](#)
- [Contact flows](#)

Click on the *function* dropdown under AWS Lambda.

The screenshot shows the AWS Lambda configuration section within the Amazon Connect interface. At the top, there's a 'Lex bots' section with a note about creating new regions. Below it is the 'AWS Lambda' section, which explains how Connect can interact with external systems via Lambda functions. A note states that by adding Lambda functions, you are granting permission for Connect to invoke them. A 'Create a new Lambda function' link is provided. A red box highlights the 'Function' dropdown menu. Below the dropdown is a list of Lambda Functions:

ARN	Description	Actions
arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-ZendeskIntegration-12O8LBYGVR0MW	ZDConnector-apse2-ds200817-ZendeskIntegration-12O8LBYGVR0MW	[Edit] [Remove]
arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-initContactDetails-1XA08NQE1Q0OG	ZDConnector-apse2-ds200817-initContactDetails-1XA08NQE1Q0OG	[Edit] [Remove]
arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-kvsConsumerTrigger-1P49Z64JEO6i6	ZDConnector-apse2-ds200817-kvsConsumerTrigger-1P49Z64JEO6i6	[Edit] [Remove]

Below the Lambda Functions is the 'Contact flow logs' section, which includes a checkbox for enabling contact flow logs and a note about log storage.

Select and add the below three lambda functions.

1. ZendeskIntegration

2. initContactDetails
3. kvsConsumerTrigger

AWS Lambda

Amazon Connect can interact with your own systems and take different paths in IVR dynamically. To achieve this, invoke AWS Lambda functions in contact flows to interact with your own systems or other services, then build personalized and dynamic experiences based on data returned.

Note: By adding Lambda functions, you are granting Amazon Connect permission to invoke them [Create a new Lambda function](#)

Lambda Functions

1. ZendeskIntegration-12O8L8YGVR0MW	arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-ZendeskIntegration-12O8L8YGVR0MW	Remove
2. initContactDetails-1XA08NQE1Q0OG	arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-initContactDetails-1XA08NQE1Q0OG	Remove
3. kvsConsumerTrigger-1P49Z64JEO6I6	arn:aws:lambda:ap-southeast-2:416881462635:function:ZDConnector-apse2-ds200817-kvsConsumerTrigger-1P49Z64JEO6I6	Remove

3.4.3 Enable live media streaming

Click on *data storage* on the left hand side menu.

Amazon Connect > [Overview](#)

- [Overview](#)
- [Telephony](#)
- [Data storage](#)
- [Data streaming](#)
- [Application integration](#)
- [Contact flows](#)

Click on *edit* under live media streaming.

Amazon Connect > vf-showcase-development

Data storage

Saving Amazon Connect data such as call recordings or scheduled reports requires access to an Amazon S3 bucket. Your data storage configurations for Amazon Connect is reflected below.

Call recordings

Call recording will be stored here vf-showcase-development/connect/vf-showcase-development/CallRecordings [Edit](#)

Encrypted using this key aws/connect

Chat transcripts

Chat transcripts Not enabled [Edit](#)

Live media streaming

Live media streaming Not enabled [Edit](#) Edit

Exported reports

Exported reports will be stored here vf-showcase-development/connect/vf-showcase-development/Reports [Edit](#)

Encrypted using this key aws/connect

[Cancel](#) [Save](#)

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Select *enable live media streaming*.

Amazon Connect > vf-showcase-development

Data storage

Saving Amazon Connect data such as call recordings or scheduled reports requires access to an Amazon S3 bucket. Your data storage configurations for Amazon Connect is reflected below.

Call recordings

Call recording will be stored here vf-showcase-development/connect/vf-showcase-development/CallRecordings [Edit](#)

Encrypted using this key aws/connect

Chat transcripts

Chat transcripts Not enabled [Edit](#)

Live media streaming

Enable live media streaming [Cancel](#) [Save](#)

Exported reports

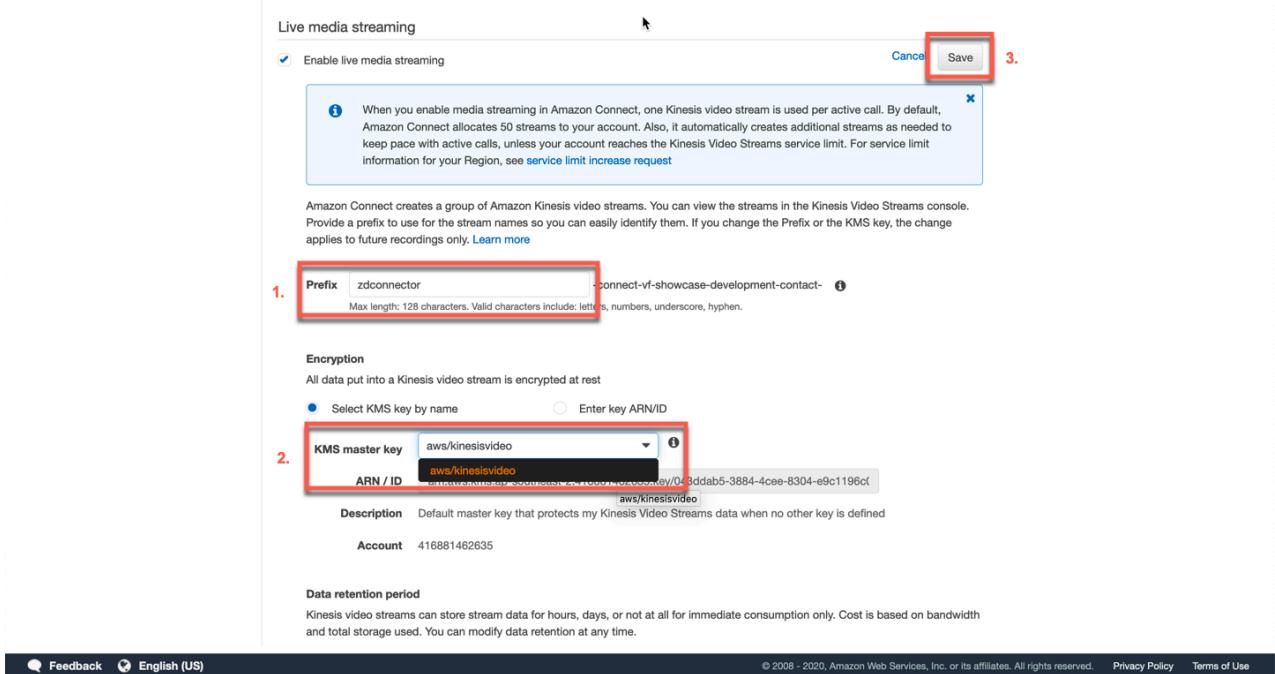
Exported reports will be stored here vf-showcase-development/connect/vf-showcase-development/Reports [Edit](#)

Encrypted using this key aws/connect

[Cancel](#) [Save](#)

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Enter a name in the *prefix* field that is unique for your AWS account. Select *aws/kinesisvideo* in the *KMS master key* dropdown. Click on save.



Click on save.

Amazon Connect > vf-showcase-development

Overview

Telephony

Data storage Data storage

Data streaming

Application integration

Contact flows

Data storage

Saving Amazon Connect data such as call recordings or scheduled reports requires access to an Amazon S3 bucket. Your data storage configurations for Amazon Connect is reflected below.

Call recordings

Call recording will be stored here: vf-showcase-development/connect/vf-showcase-development/CallRecordings Edit

Encrypted using this key: aws/connect

Chat transcripts

Chat transcripts: Not enabled Edit

Live media streaming

Prefix: zdconnector-connect-vf-showcase-development-contact- Edit

Encrypted using this key: arn:aws:kms:ap-southeast-2:416881462635:key/043ddab5-3884-4cee-8304-e9c1196c0b39

Data retention: 1 Day(s)

Exported reports

Exported reports will be stored here: vf-showcase-development/connect/vf-showcase-development/Reports Edit

Encrypted using this key: aws/connect

Save Cancel

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3.4.4 Download sample contact flows

Once you have successfully run the CloudFormation template you will be provided with a set of sample contact flows with speech analysis. Use these sample contact flows as a reference to set up your own contact flows with speech analysis.

In your AWS account, go to S3 and locate the S3 bucket that you named when running the CloudFormation template (this is the second field (2) in the CloudFormation template).

The screenshot shows the Amazon S3 console interface. On the left, there's a sidebar with links like 'Buckets', 'Batch operations', 'Access analyzer for S3', 'Block public access (account settings)', and 'Feature spotlight'. The main area is titled 'S3 buckets' and contains a search bar and a dropdown menu for 'All access types'. Below is a table with columns: 'Bucket name', 'Access', 'Region', and 'Date created'. One row in the table is highlighted with a red box, corresponding to the bucket mentioned in the text.

Bucket name	Access	Region	Date created
zendesk-agent-whisper-flow	Bucket and objects not public	Asia Pacific (Sydney)	Aug 17, 2020 4:30:12 PM GMT+1000
zendesk-outbound-whisper-flow	Objects can be public	Asia Pacific (Sydney)	Aug 17, 2020 4:29:10 PM GMT+1000
zendesk-sample-contact-flow	Objects can be public	Asia Pacific (Sydney)	Jul 20, 2020 4:42:56 PM GMT+1000
zendesk-sample-lex-flow	Objects can be public	Asia Pacific (Sydney)	Jul 20, 2020 9:39:48 AM GMT+1000
zendesk-sample-import	Objects can be public	Asia Pacific (Sydney)	Jul 17, 2020 4:08:05 PM GMT+1000
zendesk-sample-lex-import	Objects can be public	Asia Pacific (Sydney)	Jul 17, 2020 2:55:14 PM GMT+1000
zendesk-sample-contact-import	Objects can be public	Asia Pacific (Sydney)	Jul 17, 2020 11:23:40 AM GMT+1000
zendesk-sample-lex-contact-import	Public	Asia Pacific (Sydney)	Jul 17, 2020 11:23:39 AM GMT+1000

Feedback English (US) Documentation

Download the four contact flows.

The screenshot shows the Zendesk connector app interface. At the top, there are tabs for 'Overview', 'Properties', 'Permissions', 'Management', and 'Access points'. Below is a search bar. The main area has buttons for 'Upload', '+ Create folder', 'Download', 'Actions', 'Versions', 'Hide', and 'Show'. The 'Actions' button is currently selected. The table below lists files under the 'logs', 'recordings', and 'transcripts' folders. Four specific files are highlighted with a red box: 'Zendesk_AgentWhisperFlow', 'Zendesk_OutboundWhisperFlow', 'Zendesk_SampleContactFlow', and 'Zendesk_SampleLexFlow'.

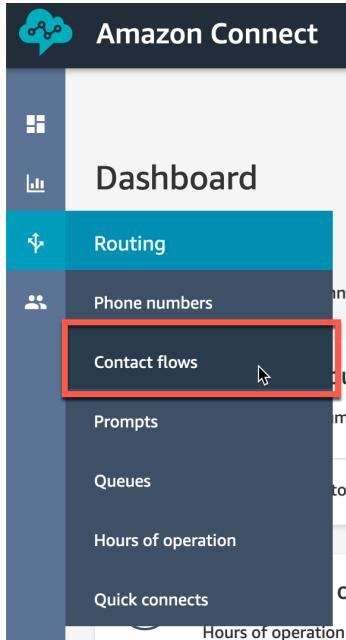
Name	Last modified	Size	Storage class
logs	--	--	--
recordings	--	--	--
transcripts	--	--	--
Zendesk_AgentWhisperFlow	Aug 17, 2020 4:31:47 PM GMT+1000	3.6 KB	Standard
Zendesk_OutboundWhisperFlow	Aug 17, 2020 4:31:47 PM GMT+1000	5.2 KB	Standard
Zendesk_SampleContactFlow	Aug 17, 2020 4:31:47 PM GMT+1000	12.4 KB	Standard
Zendesk_SampleLexFlow	Aug 17, 2020 4:31:47 PM GMT+1000	16.2 KB	Standard

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3.4.5 Import contact flows

Sign in to your Amazon Connect instance that you want to import the contact flows into.

Click on *routing* on the left hand navigation bar and select *contact flows*.

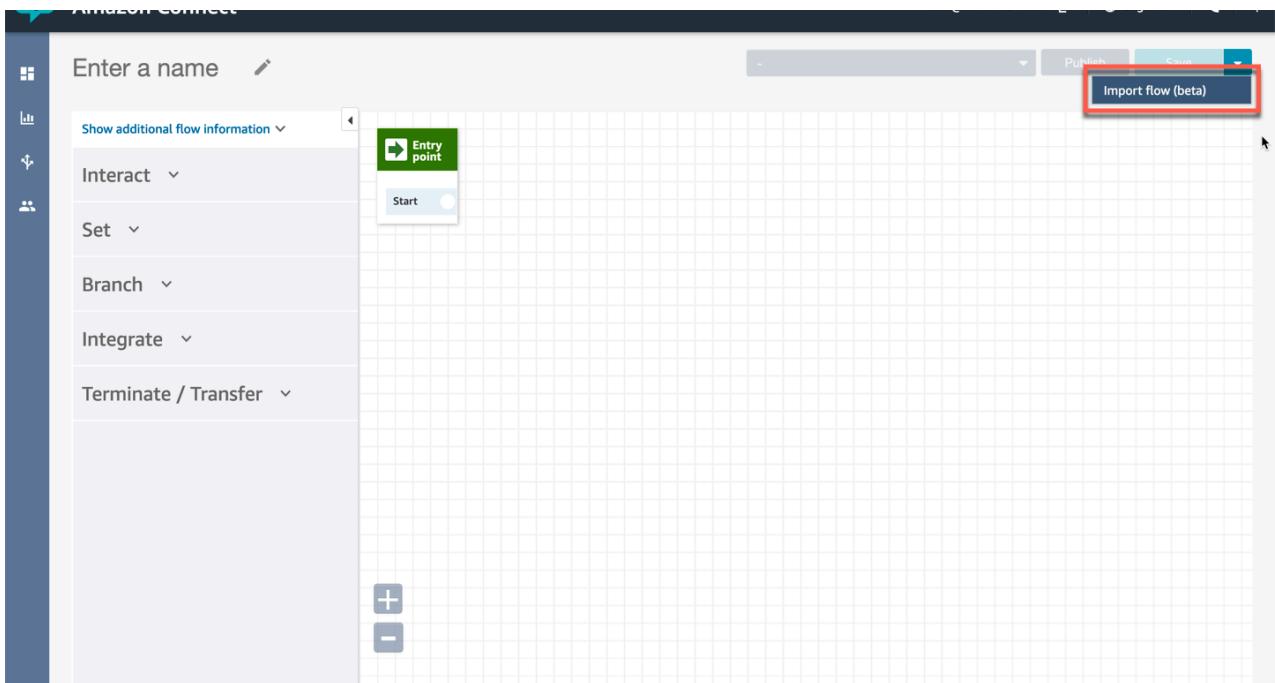


Click on the dropdown and select *create agent whisper flow*.

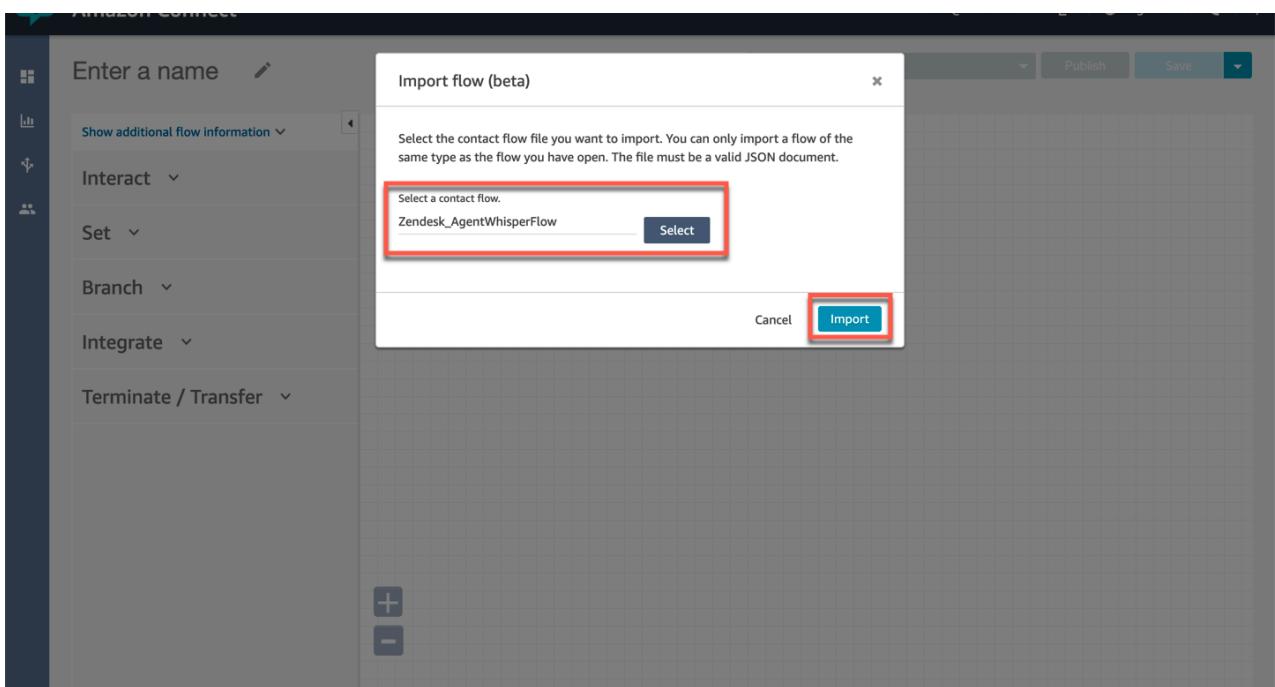
The screenshot shows the "Contact flows" page. At the top right, there's a "Create contact flow" button with a dropdown menu. The menu items are: Create customer queue flow, Create customer hold flow, Create customer whisper flow, Create outbound whisper flow, Create agent hold flow, Create agent whisper flow (which is highlighted with a red box), Create transfer to agent flow, and Create transfer to queue flow.

Name	Type	Description	Status
Default agent hold	Agent hold	Audio played for the agent when on hold	Published
Default agent transfer	Transfer to agent	Default flow to transfer to an agent.	Published
Default agent whisper	Agent whisper	Default whisper played to the agent.	Published
Default customer hold	Customer hold	Default audio the customer hears while on hold.	Published
Default customer queue	Customer queue	Default audio played when a customer is waiting in queue.	Published
Default customer whisper	Customer whisper	Default whisper played to the customer	Published
Default queue transfer	Transfer to queue	Default flow used to transfer to a queue.	Published
Sample AB test	Contact flow	Performs A/B call distribution	Published
Sample customer queue pri...	Contact flow	Demonstrates how to adjust a customer's position in a queue.	Published
Sample inbound flow (first c...	Contact flow	First call experience	Published
Sample interruptible queue ...	Customer queue	Plays looping audio and offers a callback to the customer eve...	Published
Sample Lambda integration	Contact flow	Invokes a lambda function to determine information about th...	Published
Sample note for screenpop	Contact flow	Screenpop is a Contact control pannel feature that allows lo...	Published
Sample queued callback	Contact flow	Gives the customer the option to enter a phone number to be...	Published
Sample recording behavior		Sample flow to enable recording behavior	Published

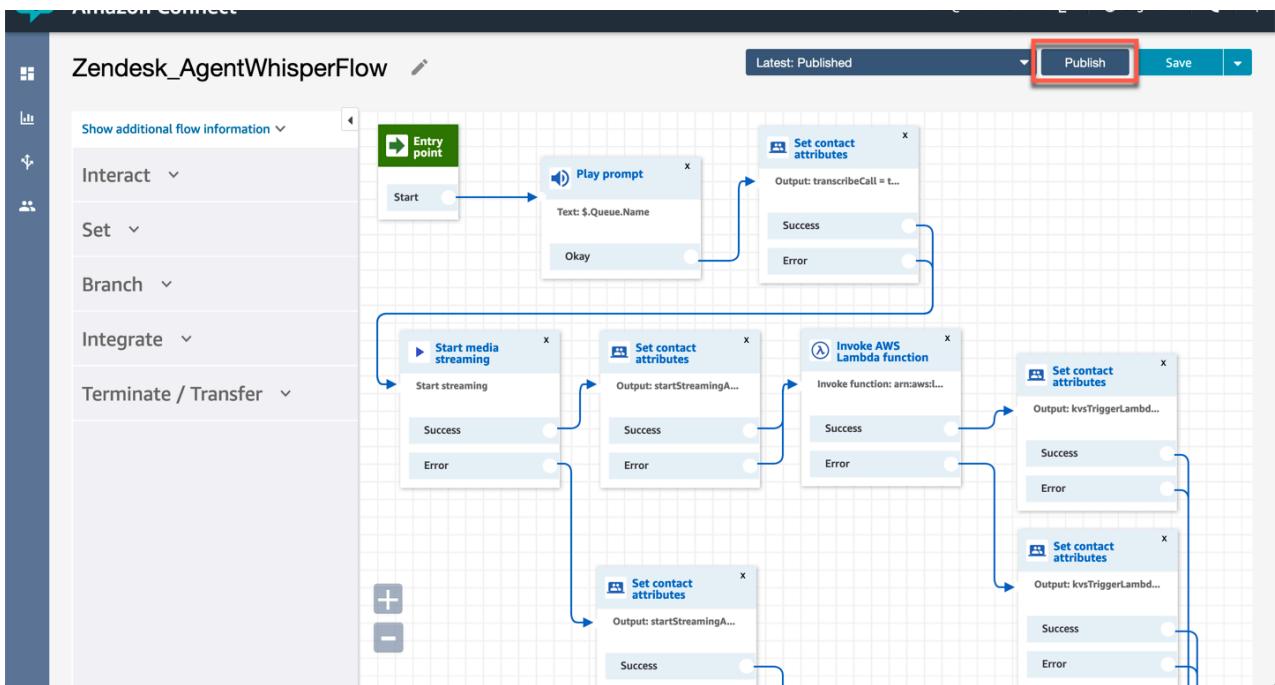
Click on the dropdown and select *import flow (beta)*.



Click on select and choose the file *Zendesk_AgentWhisperFlow* from your desktop. Click on *import*.



Click *publish*.

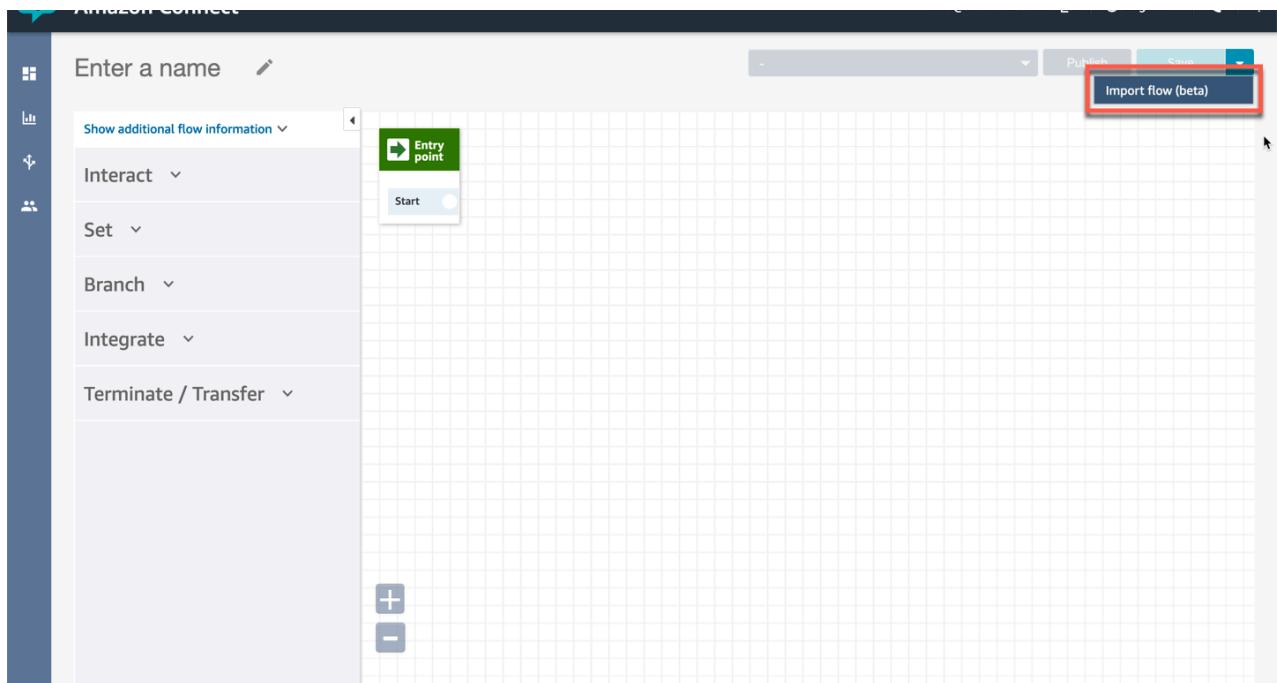


The contact flow should now appear in the contact flows list.

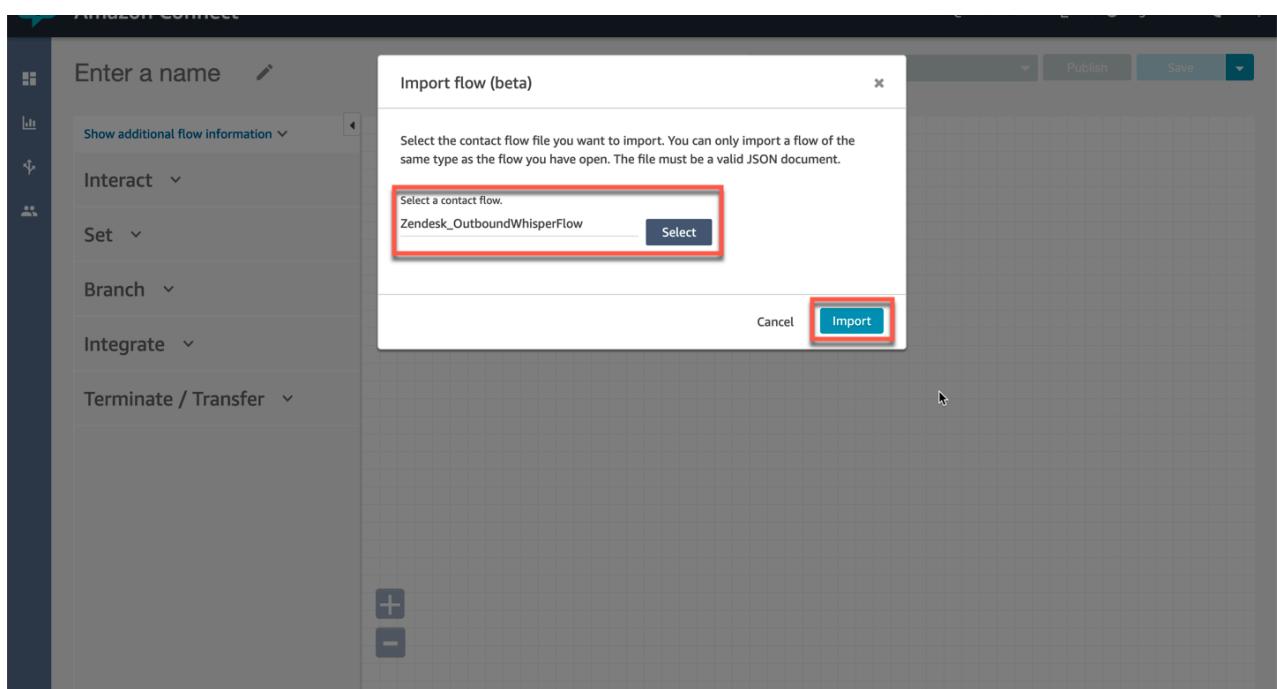
Click on *routing* on the left hand navigation bar and select *contact flows*. Click on the dropdown and select *create outbound whisper flow*.

Name	Type	Description	Status
Default agent hold	Agent hold	Audio played for the agent when on hold	Published
Default agent transfer	Transfer to agent	Default flow to transfer to an agent.	Published
Default agent whisper	Agent whisper	Default whisper played to the agent.	Published
Default customer hold	Customer hold	Default audio the customer hears while on hold.	Published
Default customer queue	Customer queue	Default audio played when a customer is waiting in queue.	Published
Default customer whisper	Customer whisper	Default whisper played to the customer	Published
Default queue transfer	Transfer to queue	Default flow used to transfer to a queue.	Published
Sample AB test	Contact flow	Performs A/B call distribution	Published
Sample customer queue pri...	Contact flow	Demonstrates how to adjust a customer's position in a queue.	Published
Sample inbound flow (first c...	Contact flow	First call experience	Published
Sample interruptible queue ...	Customer queue	Plays looping audio and offers a callback to the customer eve...	Published
Sample Lambda integration	Contact flow	Invokes a lambda function to determine information about th...	Published
Sample note for screenpop	Contact flow	Screenpop is a Contact control panel feature that allows lo...	Published
Sample queued callback	Contact flow	Gives the customer the option to enter a phone number to be...	Published
Sample recording behavior ...	Contact flow	Sample flow to enable recording behavior	Published

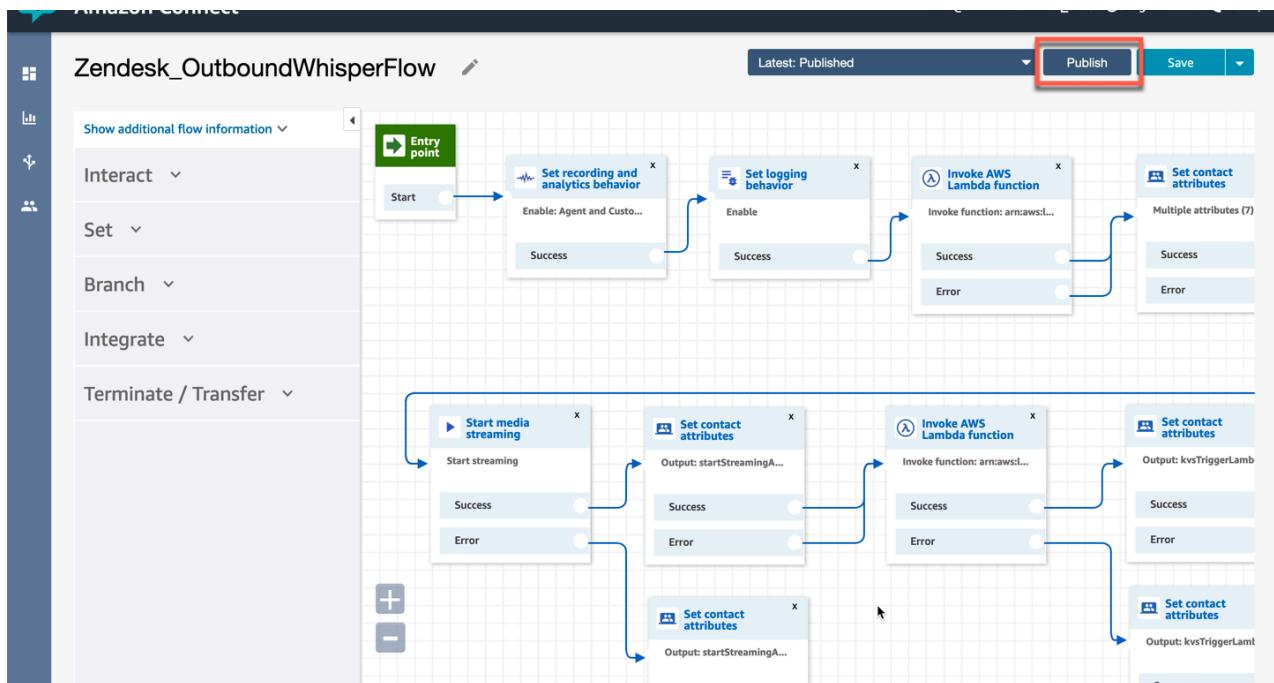
Click on the dropdown and select *import flow (beta)*.



Click on select and choose the file *Zendesk_OutboundWhisperFlow* from your desktop. Click on *import*.



Click on *publish*.

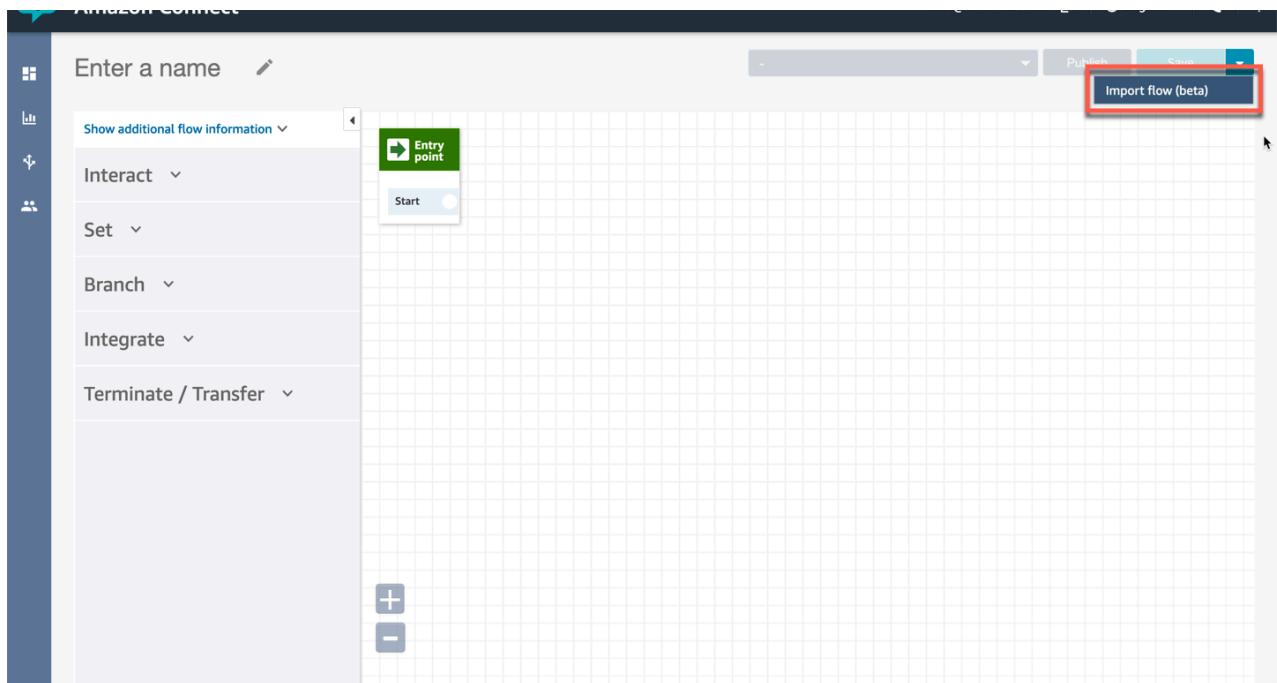


The contact flow should now appear in the contact flows list.

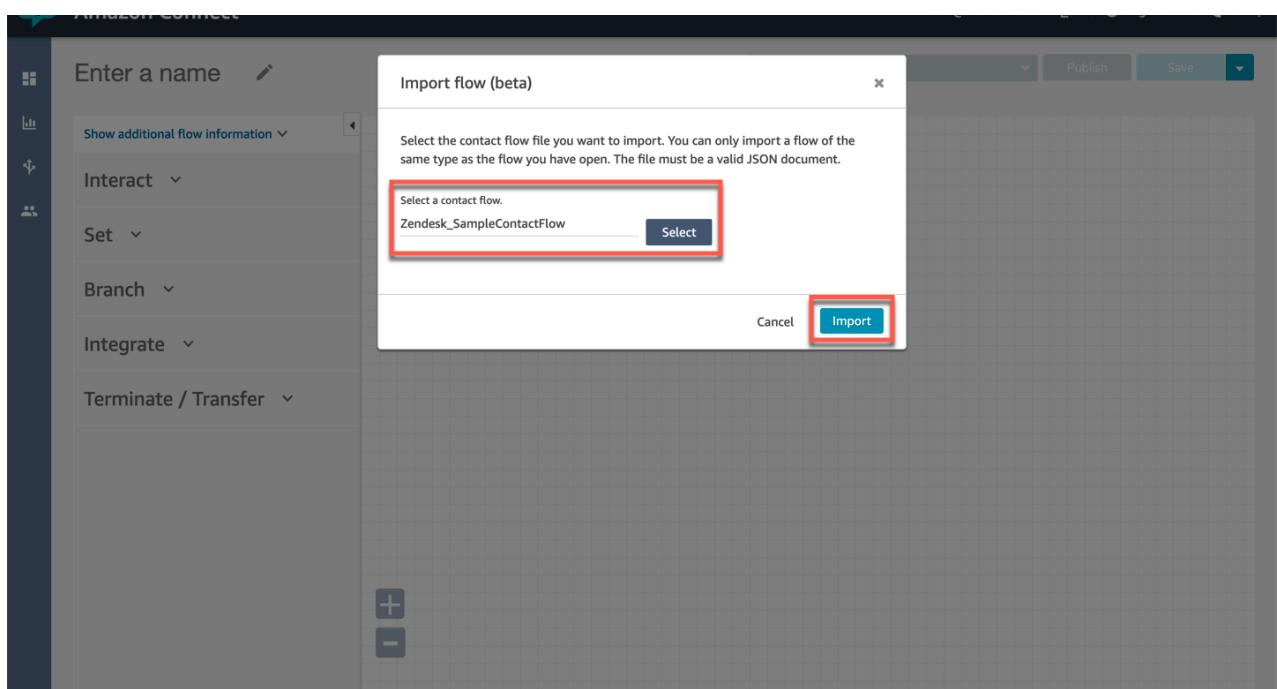
Click on *routing* on the left hand navigation bar and select *contact flows*. Click on *create contact flow*.

Name	Type	Description	Status
Default agent hold	Agent hold	Audio played for the agent when on hold	Published
Default agent transfer	Transfer to agent	Default flow to transfer to an agent.	Published
Default agent whisper	Agent whisper	Default whisper played to the agent.	Published
Default customer hold	Customer hold	Default audio the customer hears while on hold.	Published
Default customer queue	Customer queue	Default audio played when a customer is waiting in queue.	Published
Default customer whisper	Customer whisper	Default whisper played to the customer	Published
Default queue transfer	Transfer to queue	Default flow used to transfer to a queue.	Published
Sample AB test	Contact flow	Performs A/B call distribution	Published
Sample customer queue pri...	Contact flow	Demonstrates how to adjust a customer's position in a queue.	Published
Sample inbound flow (first c...	Contact flow	First call experience	Published
Sample interruptible queue ...	Customer queue	Plays looping audio and offers a callback to the customer eve...	Published
Sample Lambda integration	Contact flow	Invokes a lambda function to determine information about th...	Published
Sample note for screenpop	Contact flow	Screenpop is a Contact control panel feature that allows lo...	Published
Sample queued callback	Contact flow	Gives the customer the option to enter a phone number to be...	Published
Sample recording behavior	Contact flow	Sample flow to enable recording behavior	Published

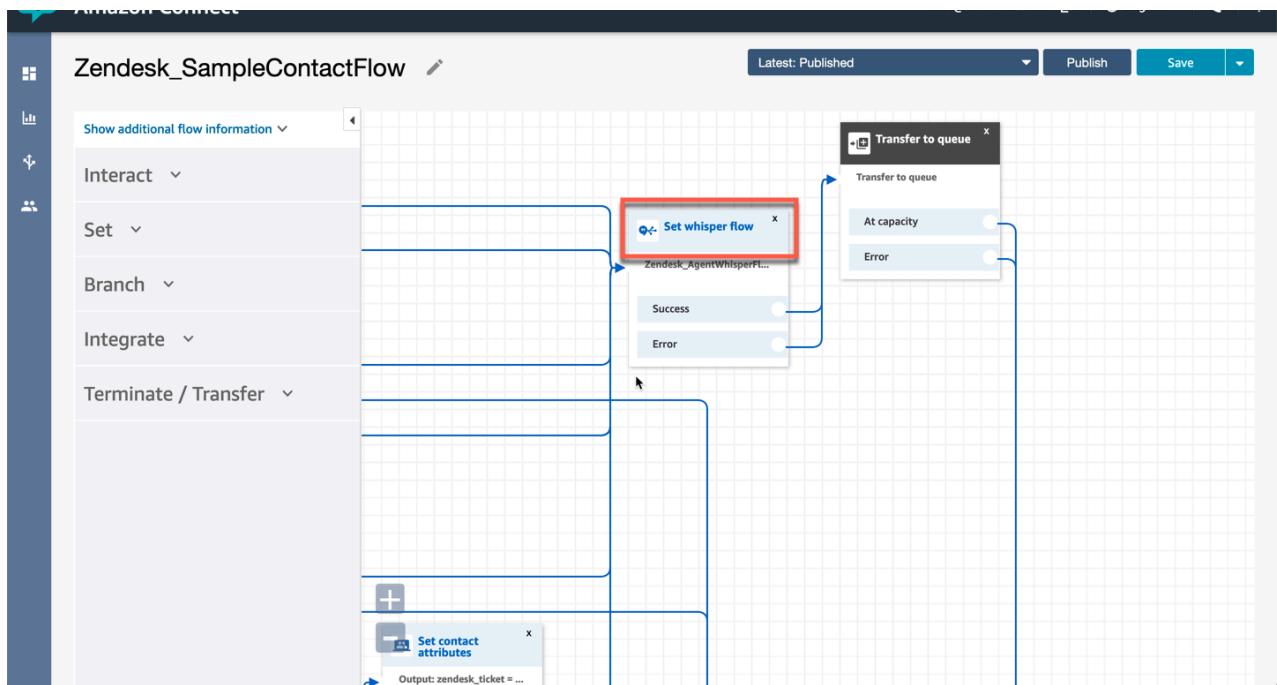
Click on the dropdown and select *import flow (beta)*.



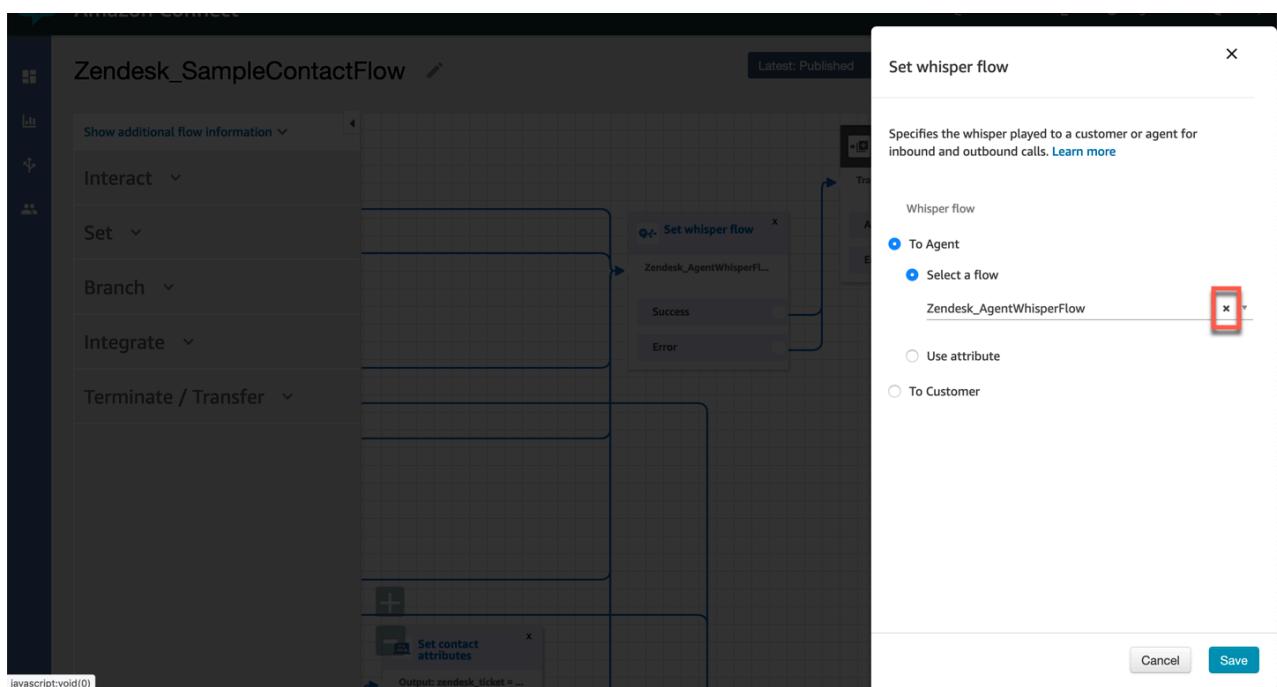
Click on select and choose the file `Zendesk_SampleContactFlow` from your desktop. Click on *import*.



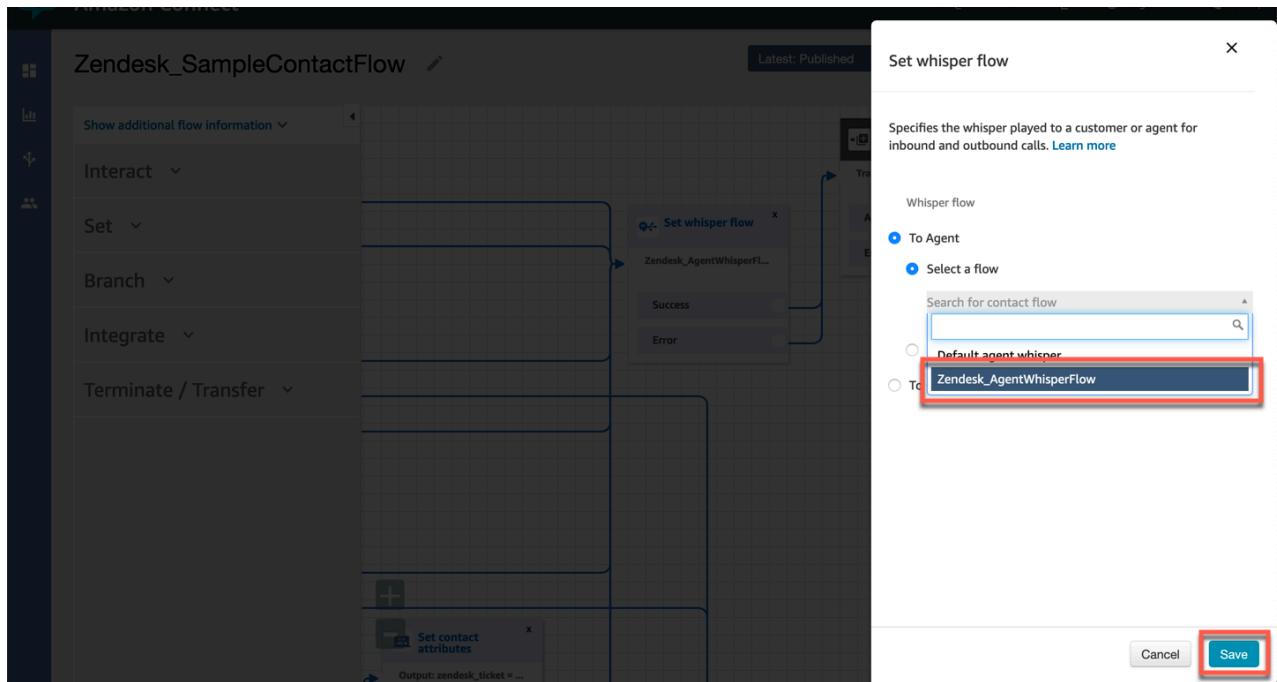
Scroll to the right of the contact flow and click on *set whisper flow*.



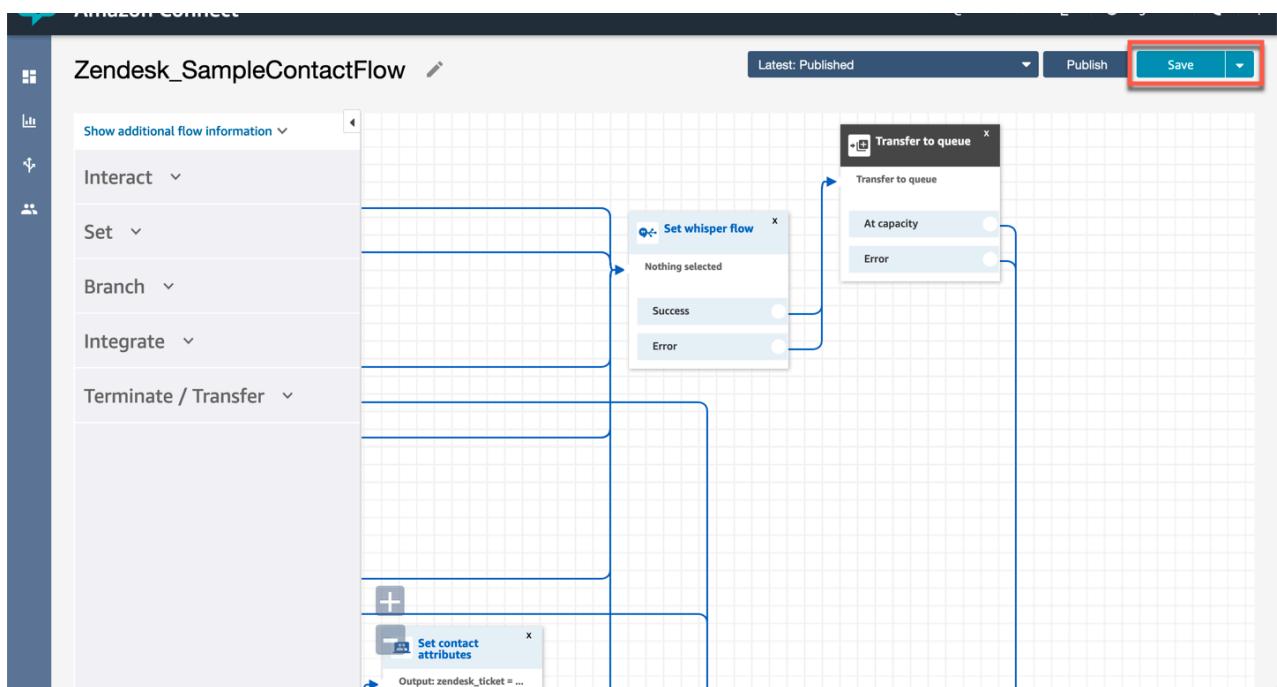
You will need to set the ARN for the `Zendesk_AgentWhisperFlow`. To do so, click on the x icon to first remove the `Zendesk_AgentWhisperFlow` contact flow.



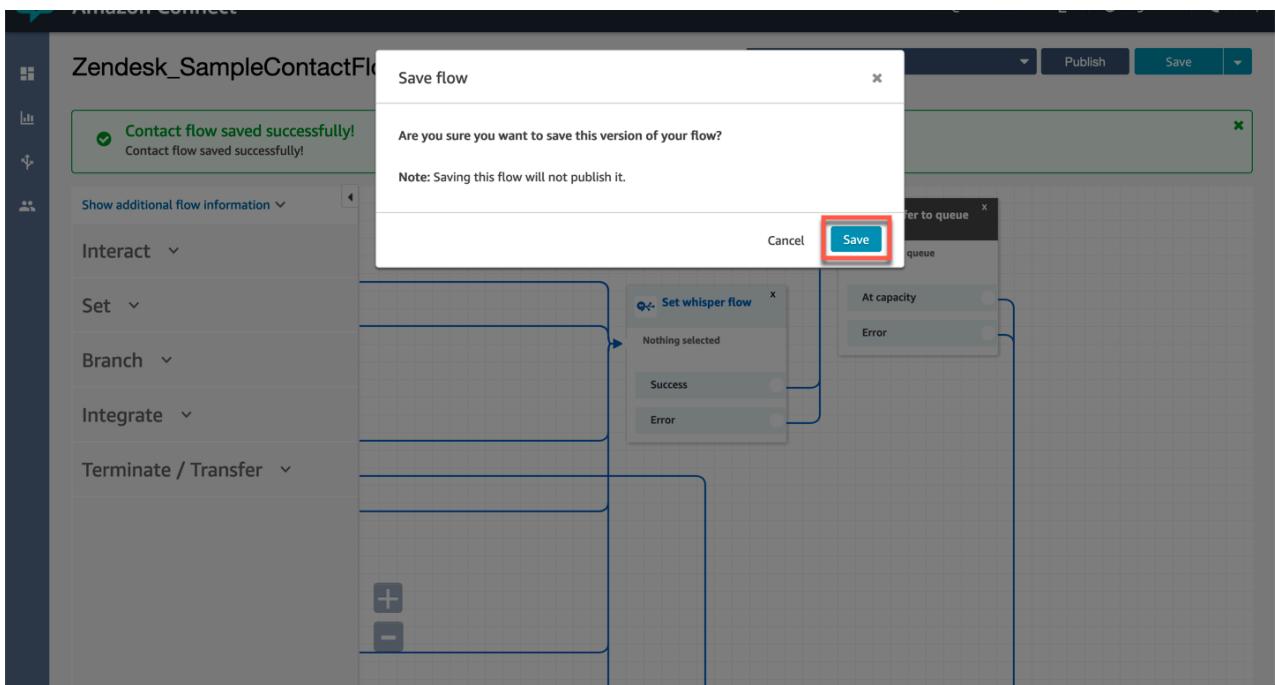
Re-select the `Zendesk_AgentWhisperFlow` contact flow. Click on save.



Click on save.

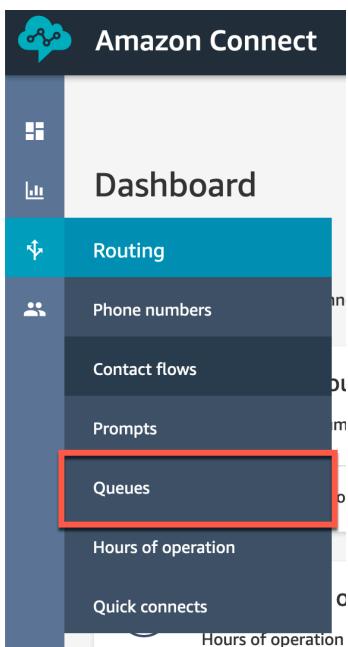


Click on save.



3.4.6 Create a queue

Click on *routing* on the left hand navigation bar and select *queues*.



Click on *add new queue*.

The screenshot shows the 'Queues' page in the Amazon Connect interface. At the top right, there is a blue button labeled 'Add new queue' which is highlighted with a red box. Below this, there is a table with four rows of queue information:

Name	Description	Status
[redacted]	A simple, basic voice queue.	Enabled
[redacted]	Queue for brand 1	Enabled
[redacted]	Queue for brand 2	Enabled
ZD Connector		Enabled

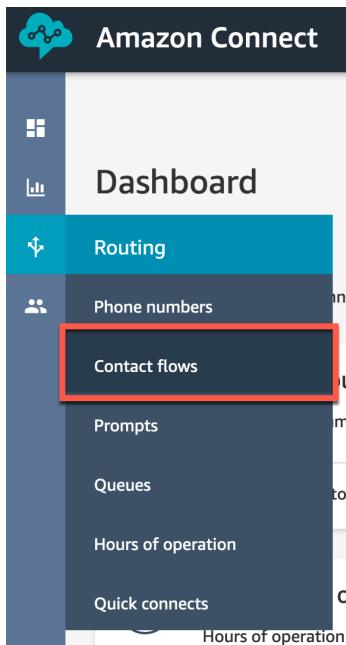
At the bottom of the table, there are pagination controls: 'Rows per page: 25', '1 - 4 of 4', and navigation arrows. Below the table, there is a link 'View historical changes'.

Give the queue the following name: *Zendesk support*. The name must be an exact match as it needs to tie back to the queue that has been set in the *Zendesk_SampleContactFlow*. Set the outbound whisper flow to *Zendesk_OutboundWhisperFlow*. Populate the remaining fields based on how you would like to set up your queue. If you need help with this please refer to the [Amazon Connect Administrator Guide](#). Click on save.

The screenshot shows the 'Edit queue' dialog. In the top right corner, there is a blue 'Save' button which is highlighted with a red box. In the 'Name' field, the value 'Zendesk Support' is entered and is also highlighted with a red box. In the 'Outbound whisper flow (optional)' field, the value 'Zendesk_OutboundWhisperFlow' is entered and is also highlighted with a red box. The 'Description' field contains 'ZD Connector'. There are also sections for 'Hours of operation' (Basic Hours), 'Outbound caller ID name' (Zendesk Connector), 'Outbound caller ID number' (+61 2 7202 3827), and 'Maximum contacts in queue (optional)' with a 'Set a limit' checkbox.

3.4.7 Publish the Zendesk_SampleContactFlow

Click on *routing* on the left hand navigation bar and select *contact flows*.



Click on the *Zendesk_SampleContactFlow* contact flow.

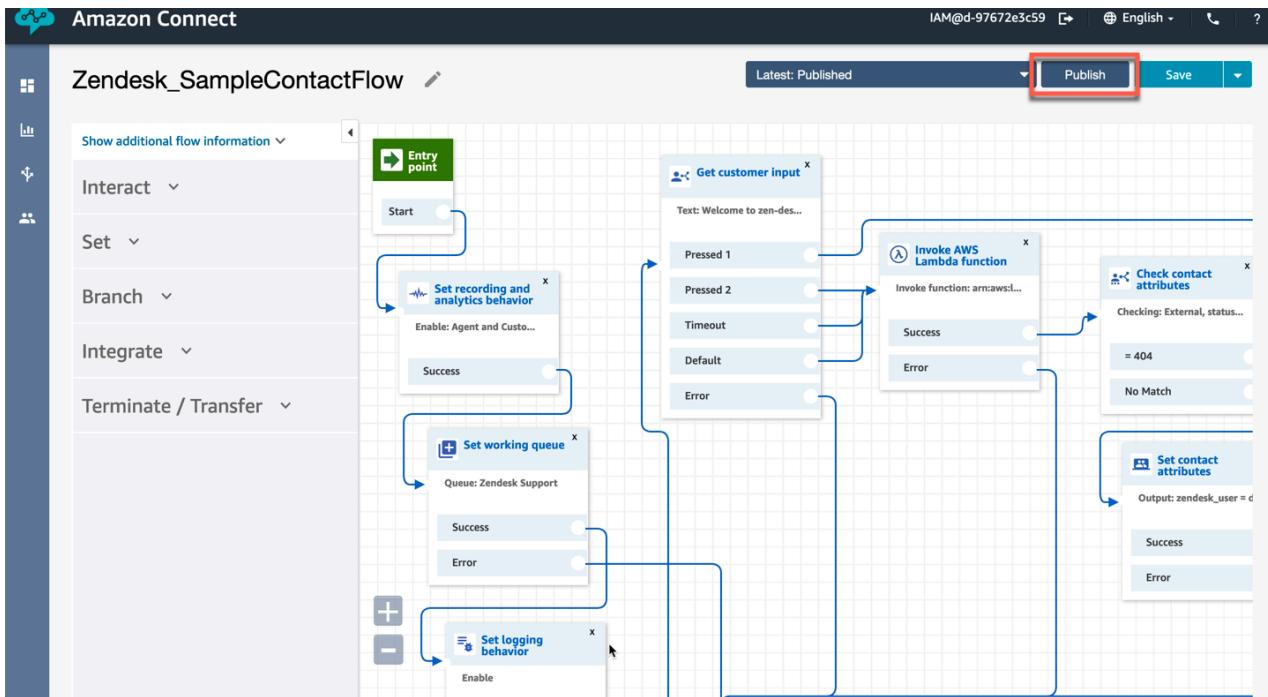
A screenshot of the Contact flows list in the Amazon Connect interface. The table has columns for Name, Type, Description, and Status. A red box highlights the row for 'Zendesk_SampleContactFlow'.

Name	Type	Description	Status
Default customer whisper	Customer whisper	Default whisper played to the customer	Published
Default queue transfer	Transfer to queue	Default flow used to transfer to a queue.	Published
Sample AB test	Contact flow	Performs A/B call distribution	Published
Sample customer queue pri...	Contact flow	Demonstrates how to adjust a customer's position in a queue.	Published
Sample inbound flow (first c...)	Contact flow	First call experience	Published
Sample interruptible queue ...	Customer queue	Plays looping audio and offers a callback to the customer eve...	Published
Sample Lambda integration	Contact flow	Invokes a lambda function to determine information about th...	Published
Sample note for screenpop	Contact flow	Screenpop is a Contact control panel feature that allows lo...	Published
Sample queued callback	Contact flow	Gives the customer the option to enter a phone number to be...	Published
Sample recording behavior	Contact flow	Sample flow to enable recording behavior	Published
Sample secure input with a...	Transfer to queue	Puts agent on hold, enabling the customer to enter digits in p...	Published
Sample secure input with n...	Contact flow	Enables the customer to enter digits in private. In a real world...	Published
ZD_Default outbound	Outbound whisper	Default flow for outbound calls.	Published
ZD_Sample queue customer	Contact flow	Places the customer in a queue.	Published
Zendesk_AgentWhisperFlow	Agent whisper	Default whisper played to the agent.	Published
Zendesk_OutboundWhisper...	Outbound whisper	Default flow for outbound calls.	Published
Zendesk_SampleContactFlow	Contact flow	Zendesk connector flow with speech analysis	Published

Rows per page: 25 < 1 - 22 of 22 >

[View historical changes](#)

Click on *publish*.

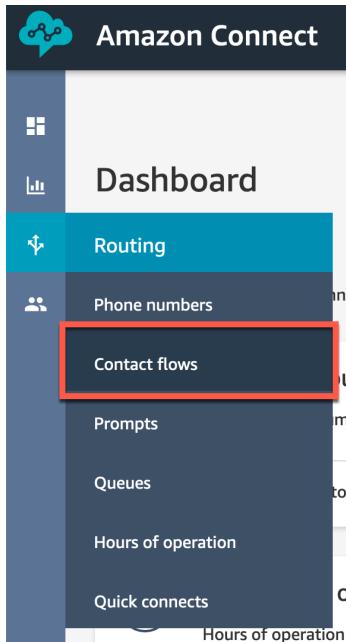


3.4.8 Import the agent transfer flow

Right click on the below agent transfer flow link, click *save link as* and save the file to your desktop.

- [Zendesk_AgentTransfer](#)

In your Connect instance, click on *routing* on the left hand navigation bar and select *contact flows*.

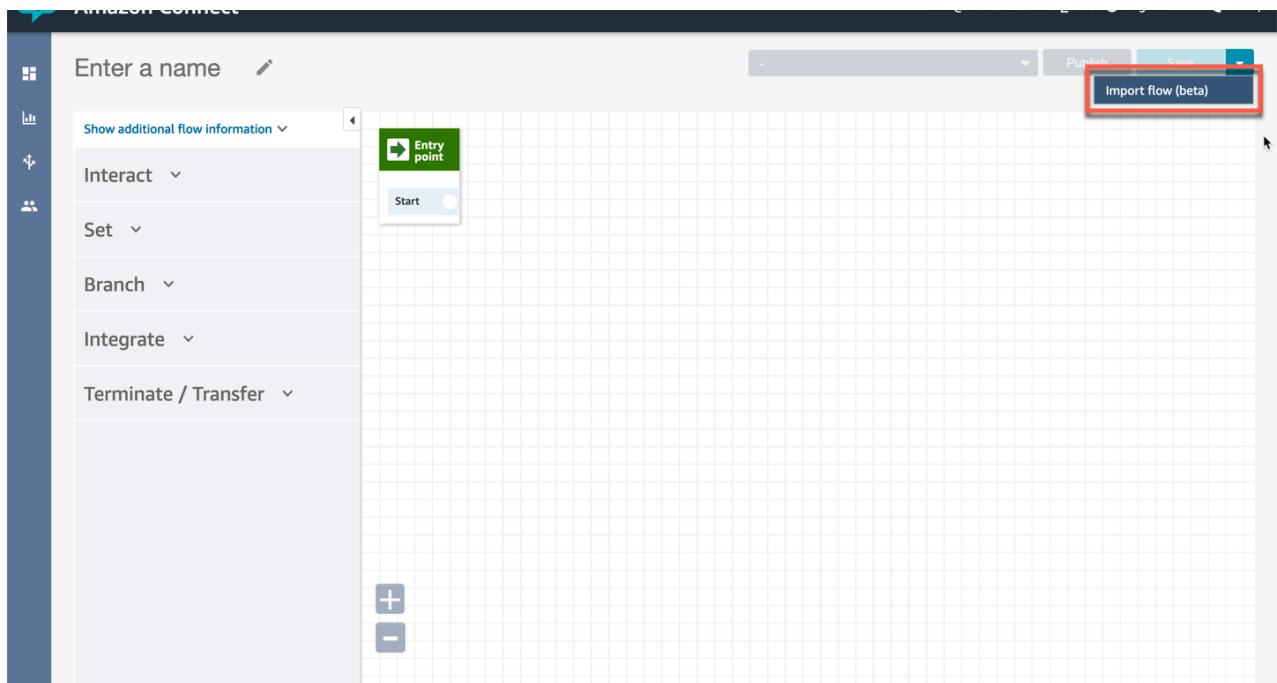


Click on the dropdown and select *create transfer to agent flow*.

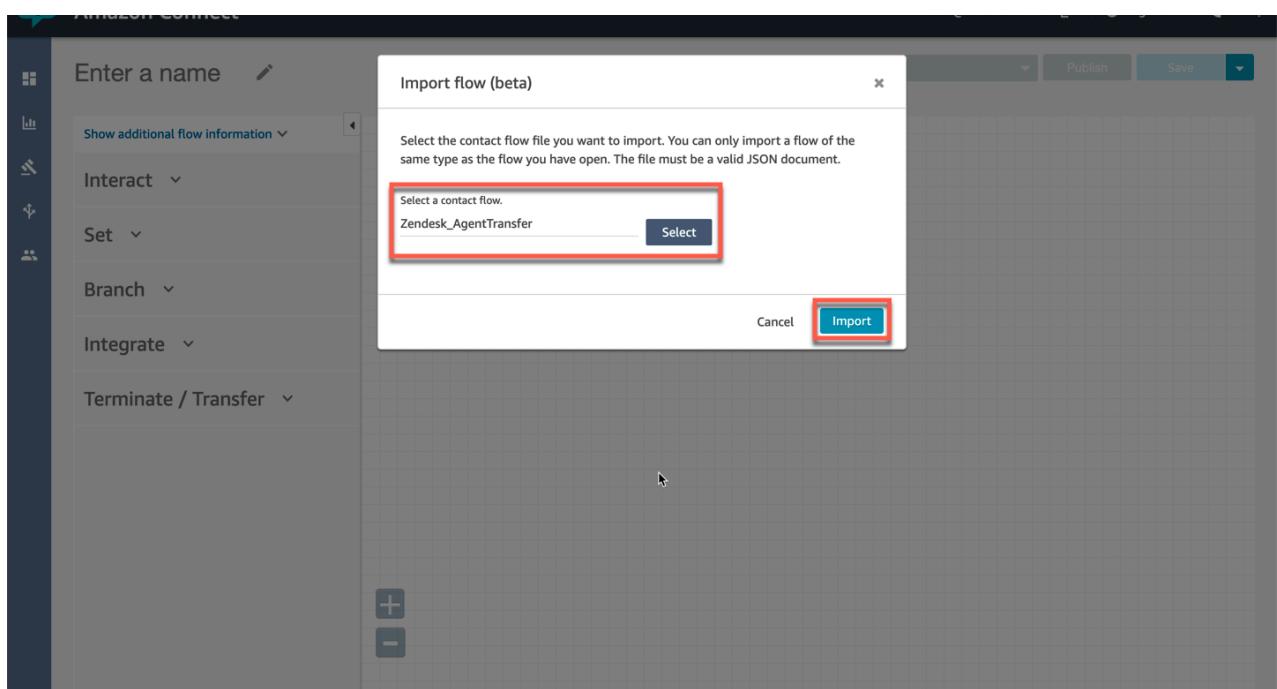
The screenshot shows the 'Contact flows' page. At the top right, there is a 'Create contact flow' button. A dropdown menu is open, listing several options: 'Create customer queue flow', 'Create customer hold flow', 'Create customer whisper flow', 'Create outbound whisper flow', 'Create agent hold flow', 'Create agent whisper flow', 'Create transfer to agent flow' (which is highlighted with a red box), and 'Create transfer to queue flow'. Below the dropdown, there is a table listing various contact flows, including 'Chat Demo Flow', 'Chat Disconnect Flow', 'Default agent hold', 'Default agent transfer', 'Default agent whisper', 'Default customer hold', 'Default customer queue', 'Default customer whisper', 'Default outbound', and 'Default queue transfer'. The 'Default queue transfer' row shows it is a 'Transfer to queue' type and is 'Published'.

Name	Type	Description	
Chat Demo Flow	Contact flow	Chat Demo including out of hours and at capacity.	
Chat Disconnect Flow	Contact flow	Disconnect Flow	
Default agent hold	Agent hold	Audio played for the agent when on hold	
Default agent transfer	Transfer to agent	Default flow to transfer to an agent.	
Default agent whisper	Agent whisper	Default whisper played to the agent.	
Default customer hold	Customer hold	Default audio the customer hears while on hold.	
Default customer queue	Customer queue	Default audio played when a customer is waiting in queue.	Published
Default customer whisper	Customer whisper	Default whisper played to the customer.	Published
Default outbound	Outbound whisper	Default flow for outbound calls.	Published
Default queue transfer	Transfer to queue	Default flow used to transfer to a queue.	Published

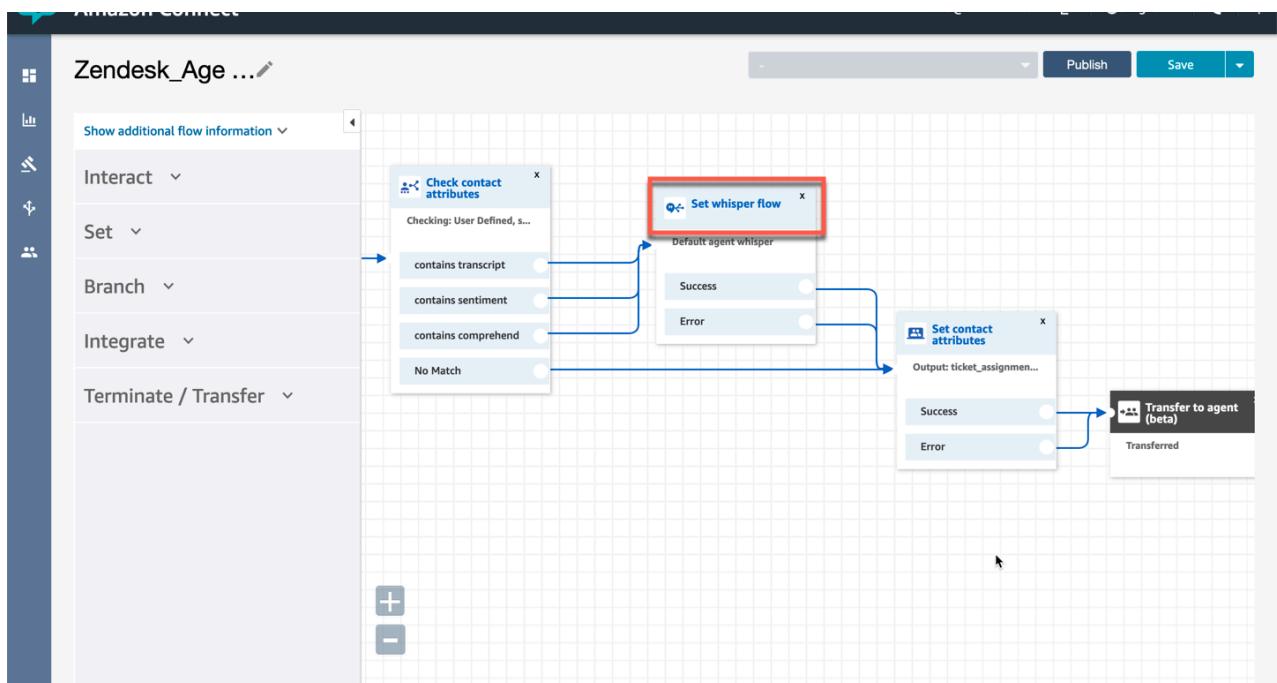
Click on the dropdown and select *import flow (beta)*.



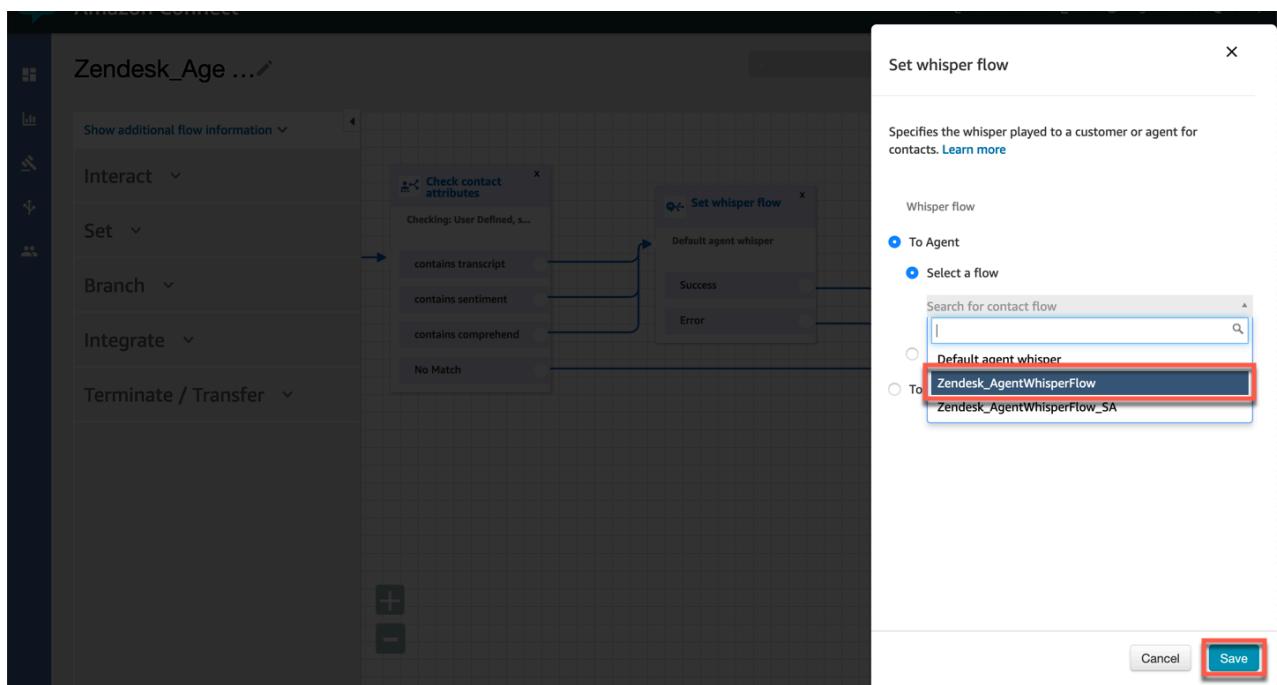
Click on select and choose the file `Zendesk_AgentTransfer.json` from your desktop. Click on *import*.



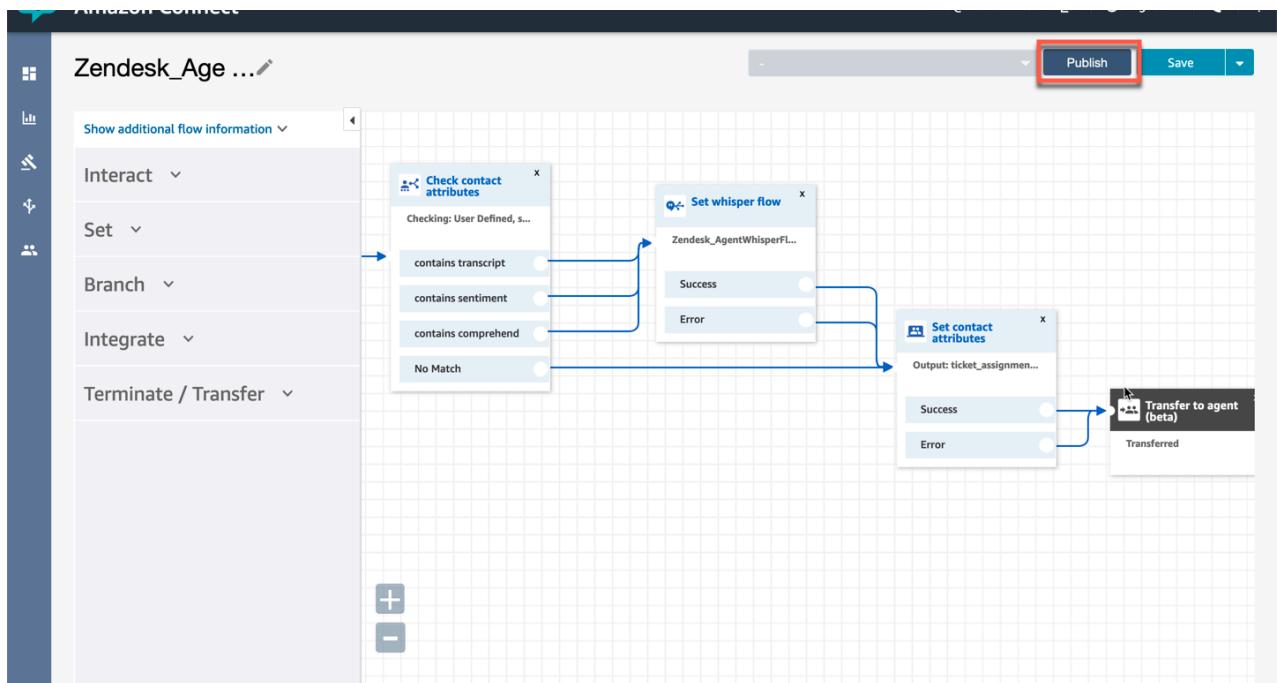
Click on *set whisper flow*.



Set the flow to *Zendesk_AgentWhisperFlow* and click on save.



Click on *publish*.



Click on *routing* on the left hand navigation bar and select *quick connects*.

Type	Description	Status
Contact flow	Chat Demo including out of hours and at capacity handling	Published
Contact flow	Disconnect Flow	Published
Agent hold	Audio played for the agent when on hold	Published
Transfer to agent	Default flow to transfer to an agent.	Published
Agent whisper	Default whisper played to the agent.	Published
Customer hold	Default audio the customer hears while on hold.	Published
Customer queue	Default audio played when a customer is waiting in queue.	Published
Customer whisper	Default whisper played to the customer	Published
Outbound whisper	Default flow for outbound calls.	Published
Transfer to queue	Default flow used to transfer to a queue.	Published
Transfer to queue		Published
Contact flow	Performs A/B call distribution	Published
Contact flow	Enables customer to transfer to another flow after the agent ...	Published
Contact flow		Published
Contact flow	First contact experience	Published

For every agent in the list, set the contact flow to *Zendesk_AgentTransfer*, then click on save.

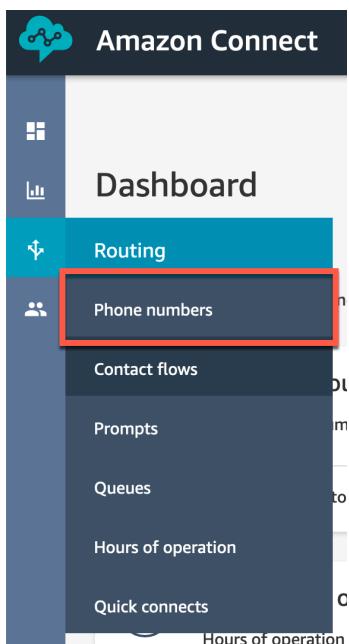
	Name	Type	Destination	Contact flow	Description
<input type="checkbox"/>	Andrej (agent)	Agent	agrobler	Zendesk_AgentTrans...	Zendesk test agent transfer
<input type="checkbox"/>	Andrej Grobler	External	+61404009763	--	Andrej's Mobile
<input type="checkbox"/>	Bayu Sigit	External	+62 813-2720-8666	--	Bayu's mobile
<input type="checkbox"/>	Bayu Test	Queue	Zendesk support	Zendesk_queue transfer	Test Bayu
<input type="checkbox"/>	Dinesh S	Agent	dinesh.sundar@voicefoundr...	Zendesk_AgentTransfer	Zendesk test agent transfer
<input type="checkbox"/>	Dinesh Sundar	External	+61 422 358 184	--	Dinesh's Mobile
<input type="checkbox"/>	John Doe	External	+61 404 009 763	--	test 1
<input type="checkbox"/>	John Smith	External	+61 404 009 763	--	test 3
<input type="checkbox"/>	Mary Smith	External	+61 404 009 763	--	test 2
<input type="checkbox"/>	Paysafe	Queue	PaysafeQueue	PaysafeSecureDataCapture	
<input type="checkbox"/>	PCS	Queue	Zendesk bare	Sample Post Contact Survey	PCS Test
<input type="checkbox"/>	Simon Fairall	External	+61 408 268 100	--	

Rows per page: 25 | 1 - 12 of 12 | < >

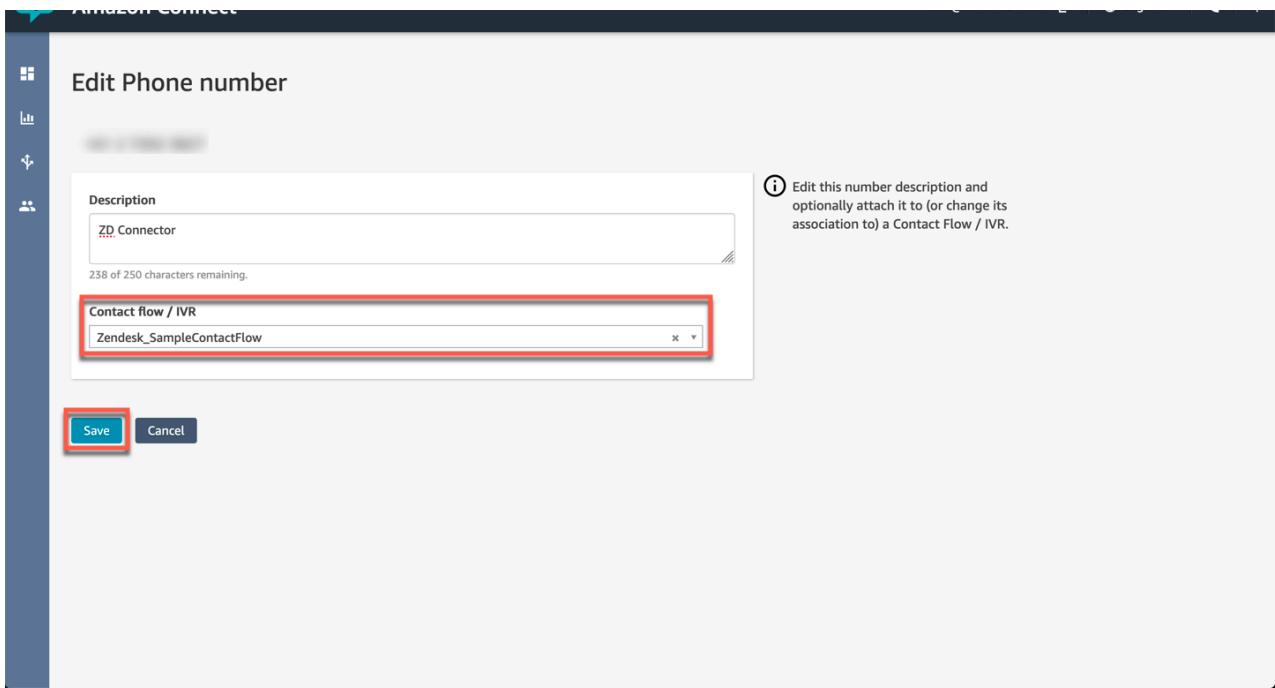
Save **Cancel**

3.4.9 Attaching the contact flow to the number assigned in the queue

Click on *routing* on the left hand navigation bar and select *phone numbers*.



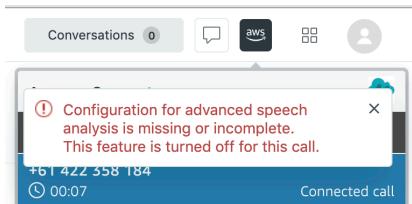
Select the phone number that you want to use for inbound calls. Under *contact flow / IVR* select *Zendesk_SampleContactFlow*. Click on *save*.



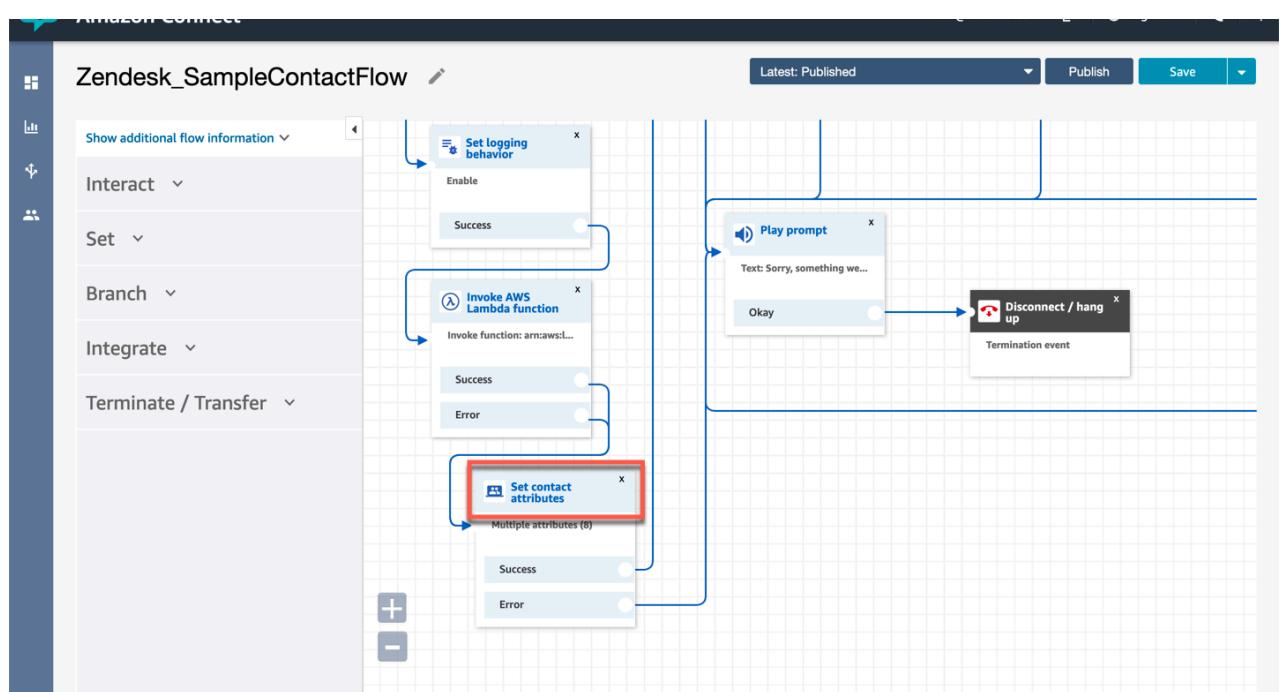
For an agent to receive calls from the queue that was set in the *Zendesk_SampleContactFlow* contact flow (i.e. *Zendesk Support* queue), ensure that the queue has been assigned to the routing profile that the agent is a part of. For more information on this please refer to the [Amazon Connect Administrator Guide \(page 14\)](#).

- i** If you would like to learn more about how you can create your own contact flows, please see the following AWS Connect documentation
- [Connect `Get Started` guide](#)
 - [Contact Flow Basics](#)

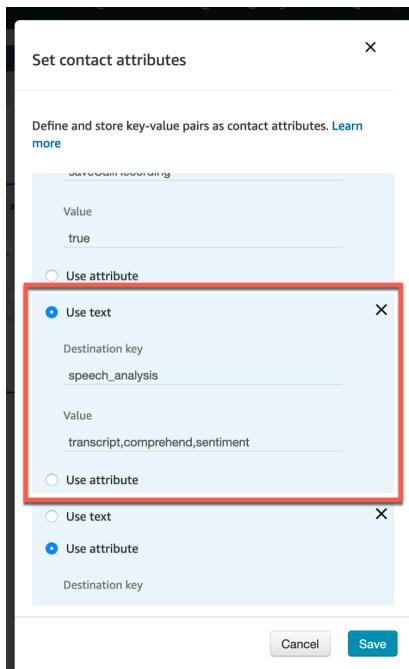
If you have set everything up correctly, you will now be able to receive inbound calls and make outbound calls in Zendesk with speech analysis enabled. In the event you have not set up speech analysis correctly, you will receive the following notification in Zendesk when you receive a call or try to make an outbound call. If you receive this notification please check that you have followed the steps as mentioned above.



By default, transcription, text comprehension and sentiment analysis are all enabled in the *Zendesk_SampleContactFlow*. To edit which values of speech analysis you want attached to a Zendesk ticket, go to the *Zendesk_SampleContactFlow* in your Connect instance and select set *contact attributes*.



Scroll down to the attribute titled *speech_analysis*. Here you can specify transcript, comprehend, and/or sentiment, or a combination of them separated by comma.



3.5 Enabling speech analysis (with Amazon Lex)

Amazon Lex uses automatic speech recognition and natural language understanding to ascertain a caller's intent. By enabling Amazon Lex within your contact flow, callers are able to use their voice to select options in the IVR.

⚠ NOTE: pay-as-you-go charges apply for Amazon Transcribe and Amazon Comprehend if you enable advanced speech analysis.

- i** Real-time speech analysis is not currently available in the eu-west-2 region. If you are running your Connect instance in eu-west-2 and would like to enable real-time speech analysis, please send a request to zendeskconnect@voicefoundry.com.au.

3.5.1 Import the Lex bot

Download the [lex bot](#).

Sign in to your AWS account, then go to Amazon Lex. Click on *get started*.



Amazon Lex

Amazon Lex is a service for building conversational interfaces using voice and text. With Lex, the same deep learning engine that powers Alexa is now available to any developer, enabling you to bring sophisticated, natural language chatbots to your new and existing applications.

[Get Started](#) [Getting Started Guide](#)



High Quality Deep Learning Technologies

Powered by the same technology as Alexa, Lex provides both automatic speech recognition (ASR) and natural language understanding (NLU) technologies to create a Speech Language Understanding (SLU) system. Through SLU, Amazon Lex takes natural language speech and text input, understands the intent, and fulfills the intent of the user.

[Learn more](#)



Seamlessly Deploy and Scale

You can build, test, and deploy your chatbots directly from the AWS Management Console. Lex allows you to easily publish your voice or text chatbots, so you can access them from mobile apps, web apps, and multiple chat services, like Facebook Messenger. Amazon Lex scales automatically so you don't have to worry about scaling your bots.

[Learn more](#)



Built-in Integration with the AWS Platform

Amazon Lex has native interoperability with several AWS services such as Amazon Cognito, AWS Lambda, Amazon DynamoDB, Amazon CloudWatch, and AWS Mobile Hub, so you can take advantage of the power of the AWS platform for security, monitoring, user authentication, business logic, storage and mobile app development.

[Learn more](#)

Amazon Lex documentation & support

[Feedback](#) [English \(US\)](#)

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Click on *custom bot*.

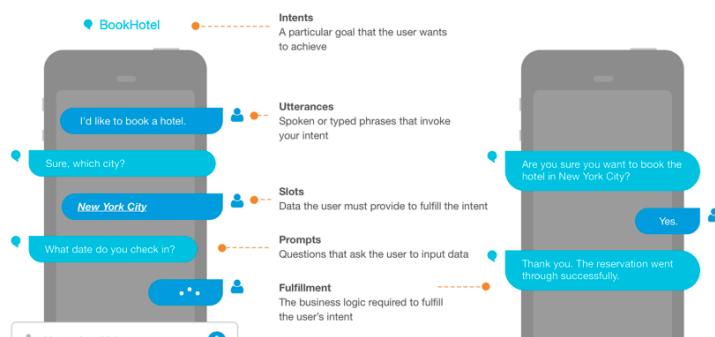
Create your bot

Amazon Lex enables any developer to build conversational chatbots quickly and easily. With Amazon Lex, no deep learning expertise is necessary—you just specify the basic conversational flow directly from the console, and then Amazon Lex manages the dialogue and dynamically adjusts the response. To get started, you can choose one of the sample bots provided below or build a new custom bot from scratch.

[CREATE YOUR OWN](#) [TRY A SAMPLE](#)

[Custom bot](#) [BookTrip](#) [OrderFlowers](#) [ScheduleAppointment](#)

Bot name
BookTrip



The diagram shows a user interaction with a bot named "BookTrip". The user says "I'd like to book a hotel." The bot asks "Sure, which city?". The user responds with "New York City". The bot then asks "What date do you check in?". The user replies "November 30th". The bot then asks "Are you sure you want to book the hotel in New York City?". The user says "Yes.". Finally, the bot confirms "Thank you. The reservation went through successfully."

Intents: A particular goal that the user wants to achieve.

Utterances: Spoken or typed phrases that invoke your intent.

Slots: Data the user must provide to fulfill the intent.

Prompts: Questions that ask the user to input data.

Fulfillment: The business logic required to fulfill the user's intent.

Click on *cancel*.

Bot name: e.g. TodaysWeather, GetDrinkOrder

Language: English (US)

Output voice: Choose your output voice.

Session timeout: e.g. 5 min

Sentiment analysis: Yes No

IAM role: AWSServiceRoleForLexBots
Automatically created on your behalf!

COPPA: Please indicate if your use of this bot is subject to the Children's Online Privacy Protection Act (COPPA). [Learn more](#)
 Yes No

Advanced options: Enable accuracy improvements and ML features. [Learn more](#)
 Yes No

Confidence score threshold: 0.4 (default)

Tags: [Tags](#)

[Cancel](#) [Create](#)

Click on the *actions* dropdown and select *import*.

Amazon Lex

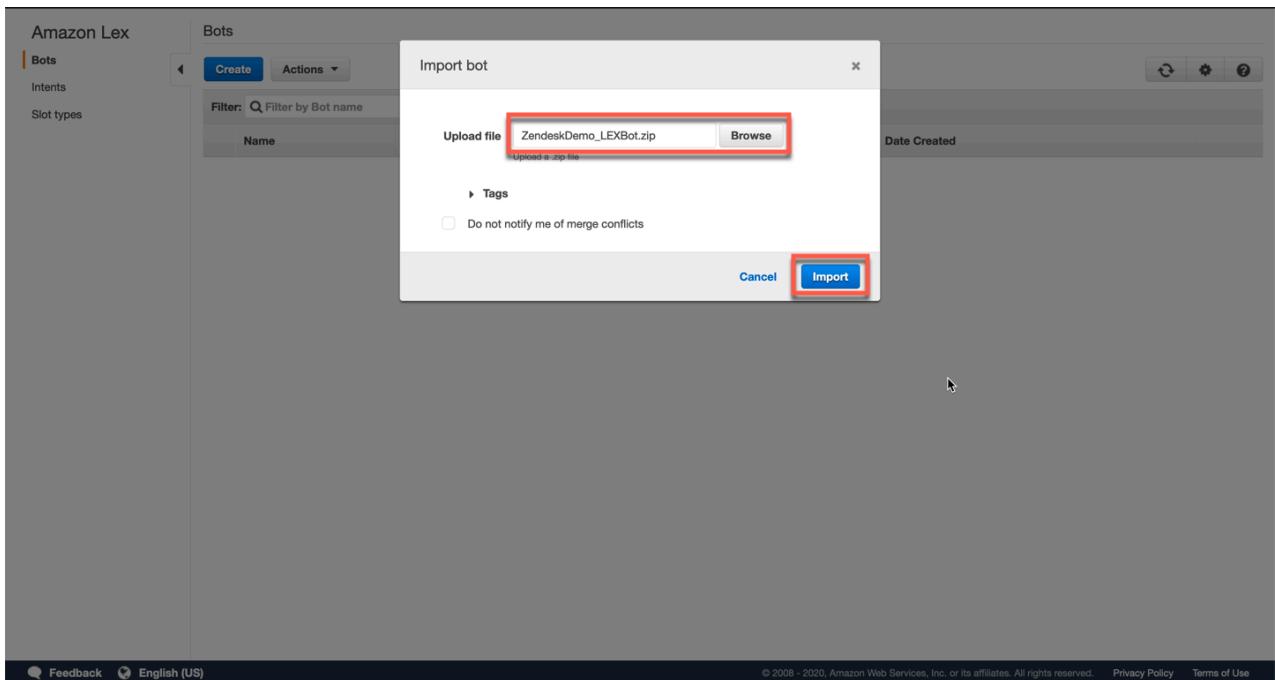
Bots

Create Actions ▾ Import Export Delete

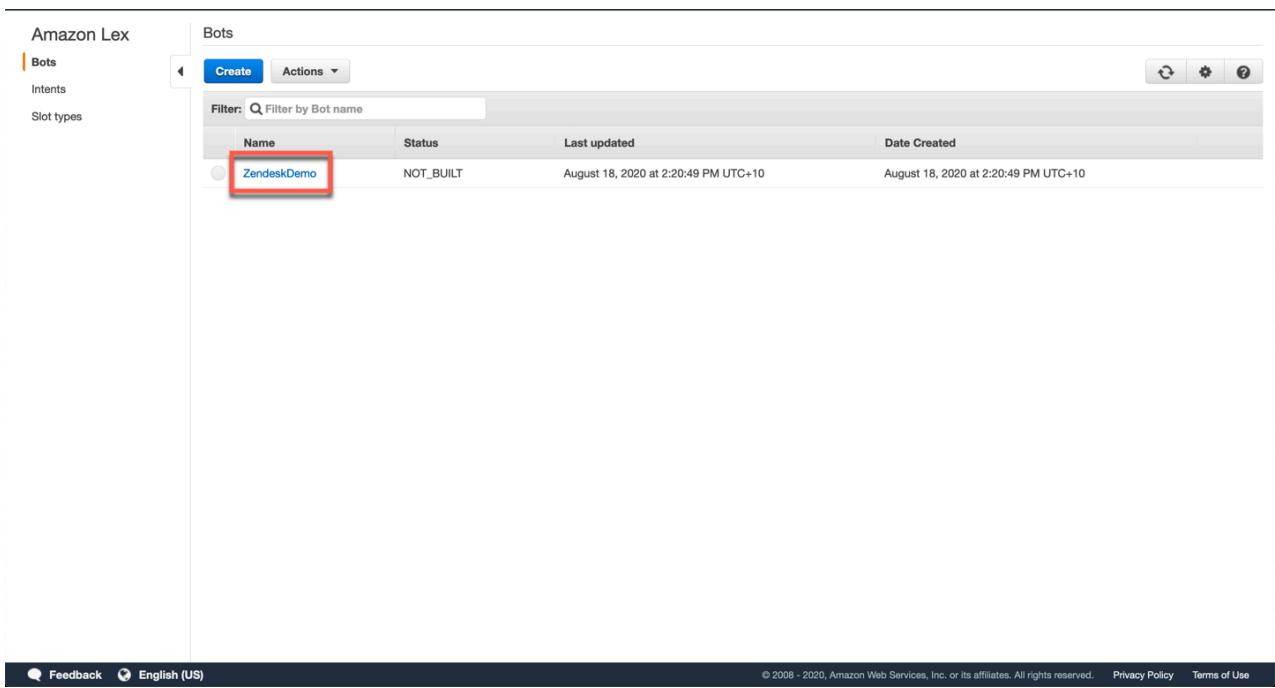
Name	Status	Last updated	Date Created
No records found.			

Feedback English (US) © 2008 - 2020, Amazon Web Services, Inc. or its affiliates. All rights reserved. Privacy Policy Terms of Use

Click on *browse* and select the file *ZendeskDemo_LEXBot.zip* that you saved to your desktop.
Click on *import*.

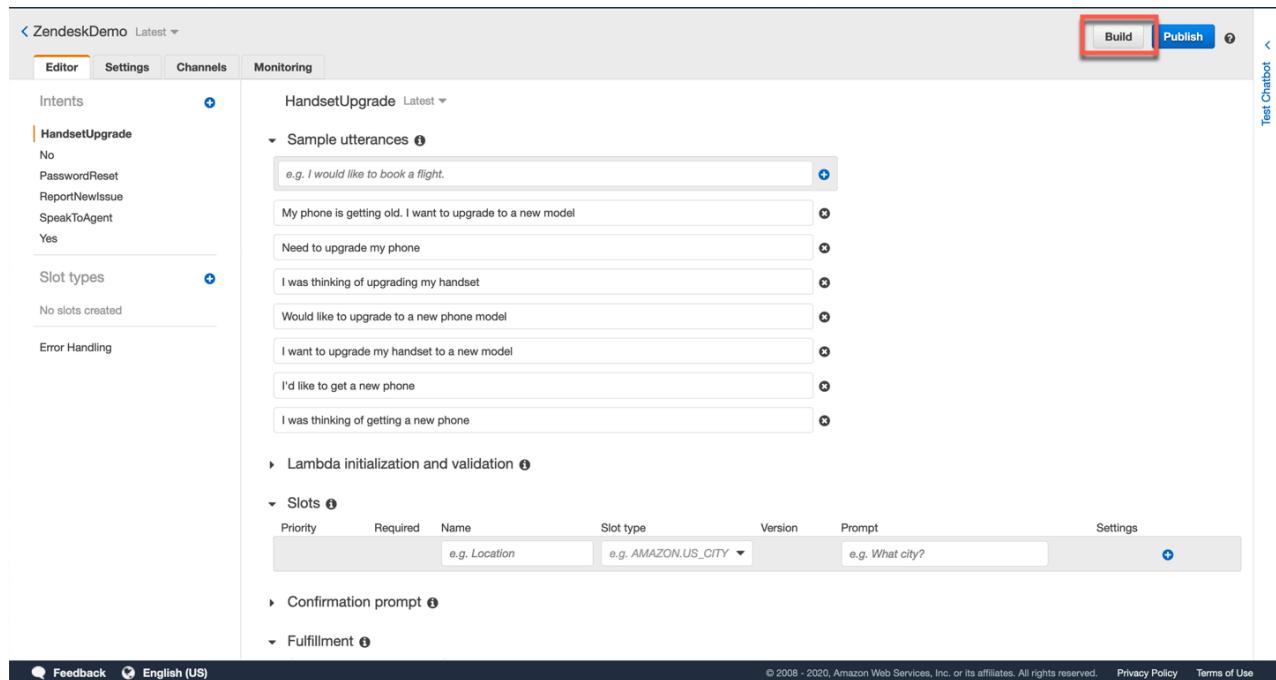


Click on the bot named *ZendeskDemo*.



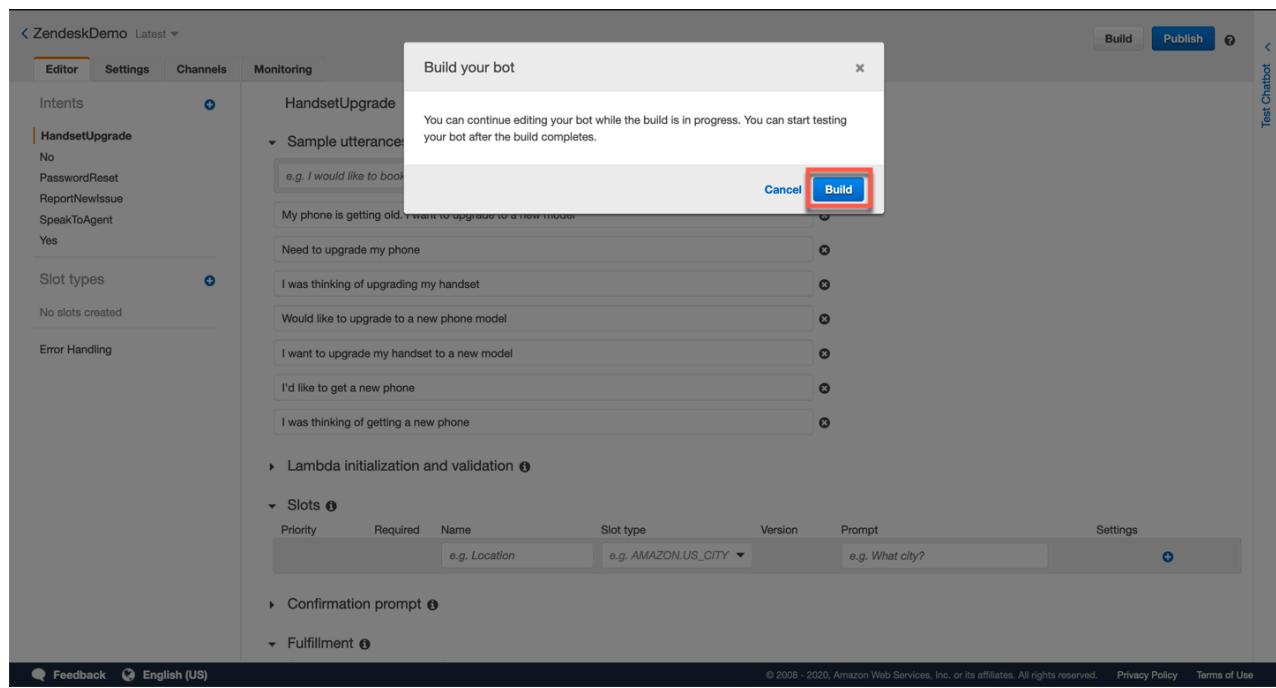
Click on *build*.

Amazon Connect App for Zendesk v2.1.2 - Installation and User Guide



The screenshot shows the Amazon Connect App for Zendesk interface. The top navigation bar includes 'ZendeskDemo Latest' and tabs for 'Editor', 'Settings', 'Channels', and 'Monitoring'. The 'Editor' tab is selected. On the left, there's a sidebar with sections for 'Intents' (HandsetUpgrade), 'Slot types' (No slots created), and 'Error Handling'. The main content area shows a list of sample utterances for the 'HandsetUpgrade' intent, each with a delete icon. Below this is a section for 'Slots' with a table header: Priority, Required, Name, Slot type, Version, Prompt, and Settings. A single slot row is shown with columns: e.g. Location, e.g. AMAZON.US_CITY, e.g. What city?. At the bottom of the page are 'Feedback', 'English (US)', and links to 'Privacy Policy' and 'Terms of Use'.

Click on build.



The screenshot shows the 'Build your bot' dialog box overlaid on the main interface. The dialog has a title 'Build your bot' and a message: 'You can continue editing your bot while the build is in progress. You can start testing your bot after the build completes.' It contains 'Cancel' and 'Build' buttons, with 'Build' being highlighted by a red box. The background shows the same interface as the previous screenshot, including the 'Editor' tab and sample utterances for the 'HandsetUpgrade' intent.

Click on publish.

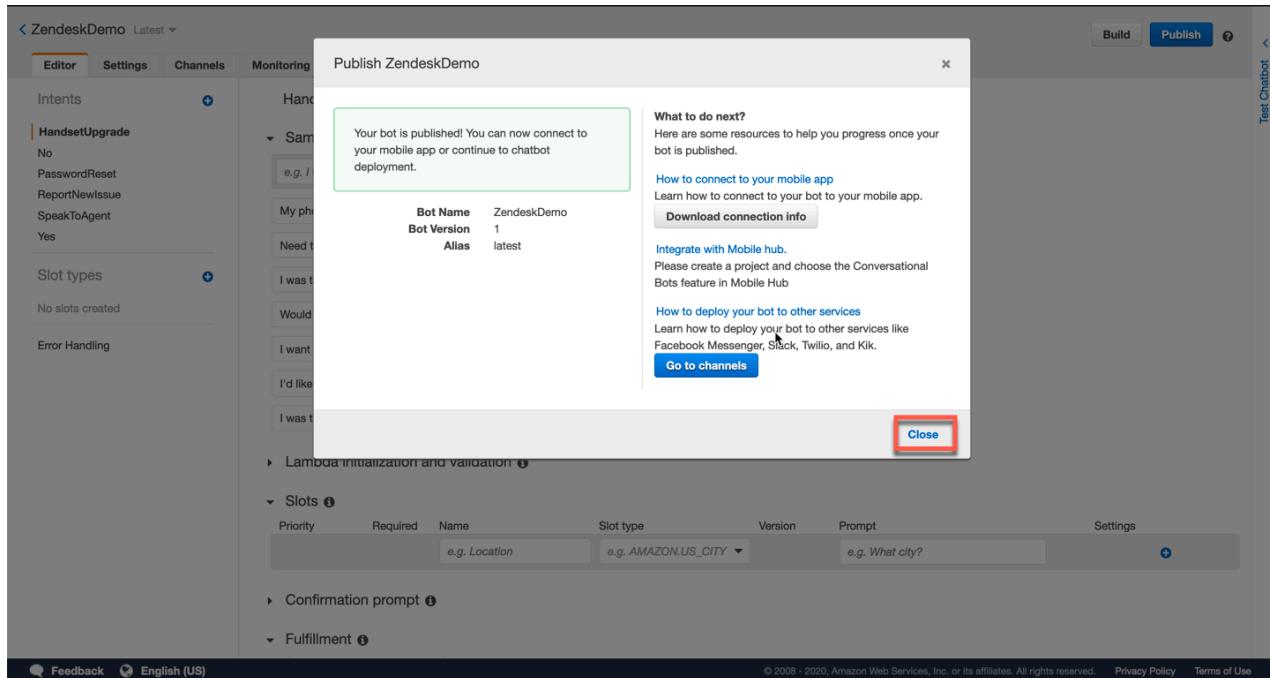
Amazon Connect App for Zendesk v2.1.2 - Installation and User Guide

The screenshot shows the 'Editor' tab of the Amazon Connect App for Zendesk. On the left, there's a sidebar with sections for Intents, Slot types, and Error Handling. The main area displays a list of sample utterances for the 'HandsetUpgrade' intent. A specific slot, 'e.g. Location', is selected, showing its details: Name (e.g. Location), Slot type (e.g. AMAZON.US_CITY), Version (e.g. What city?), and Prompt (e.g. What city?). At the top right, there are 'Build' and 'Publish' buttons, with 'Publish' being highlighted by a red box.

Enter the text *latest* in the *create an alias* text field. Click on *publish*.

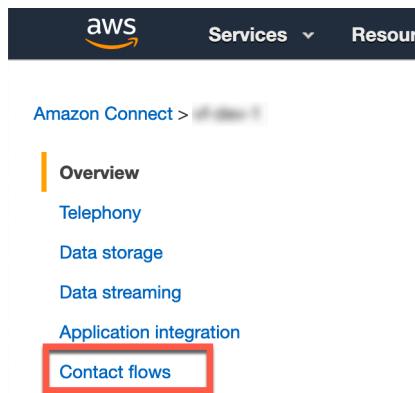
A modal dialog box titled 'Publish ZendeskDemo' is displayed over the main interface. It contains instructions: 'Publishing is the last step before you can connect your bot to your mobile app or chatbot.' Below this, there are two options: 'Create an alias' with a text input field containing 'latest' (which is highlighted with a red box) and 'Update an existing alias'. At the bottom right of the dialog is a 'Publish' button, which is also highlighted with a red box.

Click on *close*.



3.5.2 Add Lex bot to Connect

In your AWS account, go to Amazon Connect and click on your Connect instance. Click on *contact flows* on the left hand side menu.



Under Amazon Lex select the bot named *ZendeskDemo* and click on *add lex bot*.

The screenshot shows the 'Contact flow security keys' section of the Amazon Connect interface. On the left, a sidebar lists navigation options: Overview, Telephony, Data storage, Data streaming, Application integration, and Contact flows (which is selected). The main content area is titled 'Contact flow security keys'. It explains that Amazon Connect can encrypt sensitive data using X.509 certificates. Below this, there are 'Add key' and 'Remove' buttons. The 'Amazon Lex' section follows, with a note about integrating Lex bots into contact flows. It includes a 'Region' dropdown set to 'Asia Pacific: Sydney' and a 'Bot' dropdown set to 'ZendeskDemo'. A red box highlights this dropdown and the adjacent '+ Add Lex Bot' button. The 'AWS Lambda' section is also visible, with a note about invoking Lambda functions in IVR paths.

3.5.3 Enable speech analysis with Amazon Lex

Follow the same steps as section [3.4 enabling speech analysis \(with DTMF\)](#) in this document, and wherever the steps reference `Zendesk_SampleContactFlow`, use `Zendesk_SampleLexFlow` instead. The `Zendesk_SampleLexFlow` contact flow is located in the S3 bucket created when you run the CloudFormation template for speech analysis.

3.6 Offline transcribe and comprehend

By enabling offline transcribe and comprehend, users are able to store the following in an S3 bucket:

- The transcript of a call between an agent and caller.
- Speech analysis of the customer's transcript, including the language of the text, key phrases, places, people, brands, events and sentiment analysis.

To enable offline transcribe and comprehend follow the below steps.



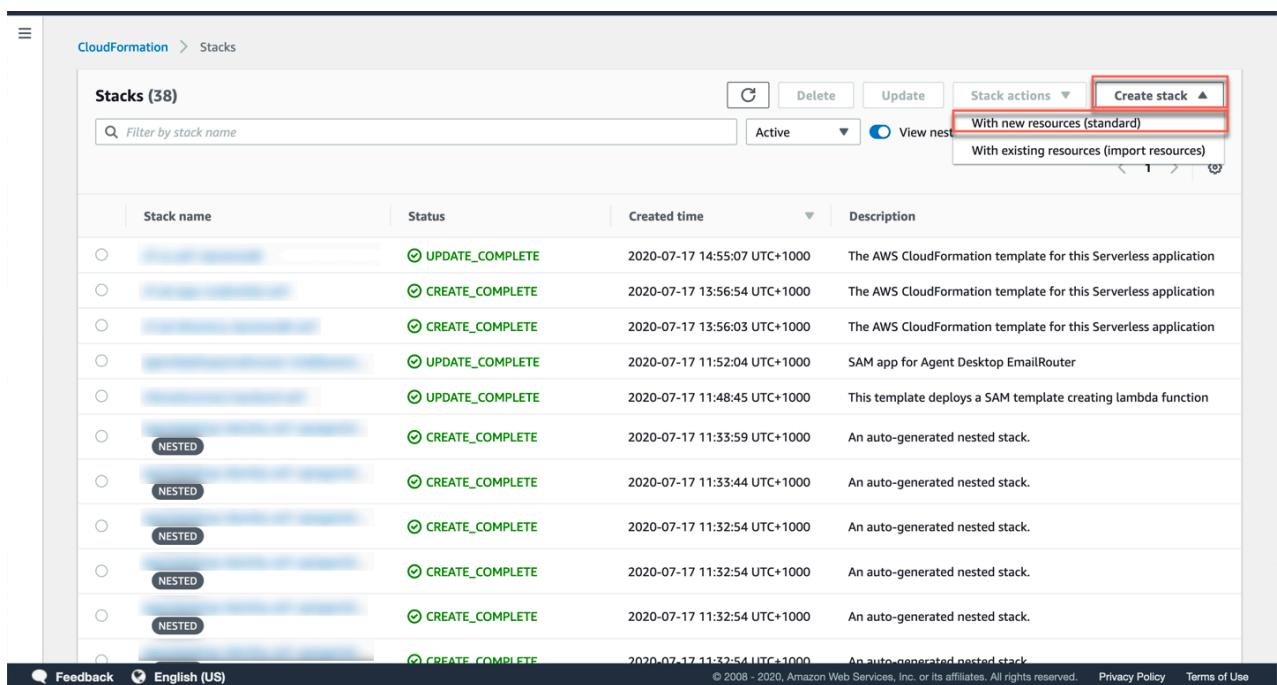
Pay-as-you-go charges apply for Amazon Transcribe and Amazon Comprehend if you enable Offline transcribe and comprehend.

3.6.1 Run the offline transcribe and comprehend CloudFormation template

Download the offline transcribe and comprehend [CloudFormation template](#).

Sign in to your AWS account. Go to CloudFormation and click on *create stack with new resources (standard)*.

-  Make sure you create a CloudFormation stack in the same region as your Connect instance.



The screenshot shows the AWS CloudFormation Stacks page. At the top, there is a navigation bar with 'CloudFormation > Stacks'. Below the navigation is a search bar labeled 'Filter by stack name' and a dropdown menu set to 'Active'. To the right of the search bar is a 'Create stack' button, which is highlighted with a red box. A tooltip above the button says 'With new resources (standard)'. Below the search bar is a table titled 'Stacks (38)'. The table has columns for 'Stack name', 'Status', 'Created time', and 'Description'. Most stacks listed have a status of 'CREATE_COMPLETE'. Some stacks are marked as 'NESTED'. The descriptions provide details about the templates used for deployment. At the bottom of the page, there are links for 'Feedback', 'English (US)', and legal notices including 'Privacy Policy' and 'Terms of Use'.

Select *template is ready, upload a template file* and click on *choose file*.

CloudFormation > Stacks > Create stack

Create stack

Prerequisite - Prepare template

Prepare template
Every stack is based on a template. A template is a JSON or YAML file that contains configuration information about the AWS resources you want to include in the stack.

Template is ready Use a sample template Create template in Designer

Specify template

A template is a JSON or YAML file that describes your stack's resources and properties.

Template source
Selecting a template generates an Amazon S3 URL where it will be stored.

Amazon S3 URL Upload a template file

Upload a template file
Choose file No file chosen
JSON or YAML formatted file

S3 URL: Will be generated when template file is uploaded View in Designer

Cancel **Next**

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Select the CloudFormation template you downloaded earlier. Click on *next*.

CloudFormation > Stacks > Create stack

Create stack

Prerequisite - Prepare template

Prepare template
Every stack is based on a template. A template is a JSON or YAML file that contains configuration information about the AWS resources you want to include in the stack.

Template is ready Use a sample template Create template in Designer

Specify template

A template is a JSON or YAML file that describes your stack's resources and properties.

Template source
Selecting a template generates an Amazon S3 URL where it will be stored.

Amazon S3 URL Upload a template file

Upload a template file
Choose file Offlinetandc%20%281%29.yaml
JSON or YAML formatted file

S3 URL: https://s3-ap-southeast-2.amazonaws.com/cf-templates-1uu2mrfzn3k0h-ap-southeast-2/2020231yLW-Offlinetandc%20%281%29.yaml View in Designer

Cancel **Next**

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Enter the following details:

1. Stack name. Must be a unique name.
2. AudioBucket. This is the name of the S3 bucket that call recordings from your Amazon Connect instance are being stored in. To locate the name of the S3 bucket for your

Connect instance, go to Amazon Connect and select your Connect instance. In the left hand navigation click on *data storage*.



Amazon Connect > [Select]

- Overview**
- Telephony
- Data storage**
- Data streaming
- Application integration
- Contact flows

You can locate the name of your S3 bucket here.

Data storage

Saving Amazon Connect data such as call recordings or scheduled reports requires access to an Amazon S3 bucket. Your data storage configurations for Amazon Connect is reflected below.

Call recordings

Call recording will be stored here	/	Edit
Encrypted using this key	aws/connect	

The name of your S3 bucket is located
here before the first forward slash

Chat transcripts

Chat transcripts	Not enabled	Edit
------------------	-------------	----------------------

Live media streaming

Prefix	zdconnector-connect-vf-showcase-development-contact-	Edit
Encrypted using this key	arn:aws:kms:ap-southeast-2:416881462635:key/043ddab5-3884-4cee-8304-e9c1196c0b39	
Data retention	1 Day(s)	

Exported reports

Exported reports will be stored here	vf-showcase-development/connect/vf-showcase-development/Reports	Edit
Encrypted using this key	aws/connect	

[Cancel](#) [Save](#)

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Copy and paste the name of the S3 bucket into the *AudioBucket* field in the CloudFormation template.

Click on next.

CloudFormation > Stacks > Create stack

Step 1
Specify template

Step 2
Specify stack details

Step 3
Configure stack options

Step 4
Review

Specify stack details

Stack name

Stack name

Stack name can include letters (A-Z and a-z), numbers (0-9), and dashes (-).

Parameters

Parameters are defined in your template and allow you to input custom values when you create or update a stack.

AudioBucket

Enter the name of the S3 bucket where call recordings will be processed from. This template will fail to deploy if the bucket name provided does not exist.

2.

Cancel Previous Next

Click on next.

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Step 1
Specify template

Step 2
Specify stack details

Step 3
Configure stack options

Step 4
Review

Configure stack options

Tags

You can specify tags (key-value pairs) to apply to resources in your stack. You can add up to 50 unique tags for each stack. [Learn more](#)

Key	Value	Remove
-----	-------	--------

Add tag

Permissions

Choose an IAM role to explicitly define how CloudFormation can create, modify, or delete resources in the stack. If you don't choose a role, CloudFormation uses permissions based on your user credentials. [Learn more](#)

IAM role - optional

Choose the IAM role for CloudFormation to use for all operations performed on the stack.

IAM role name	Sample-role-name	Remove
---------------	------------------	--------

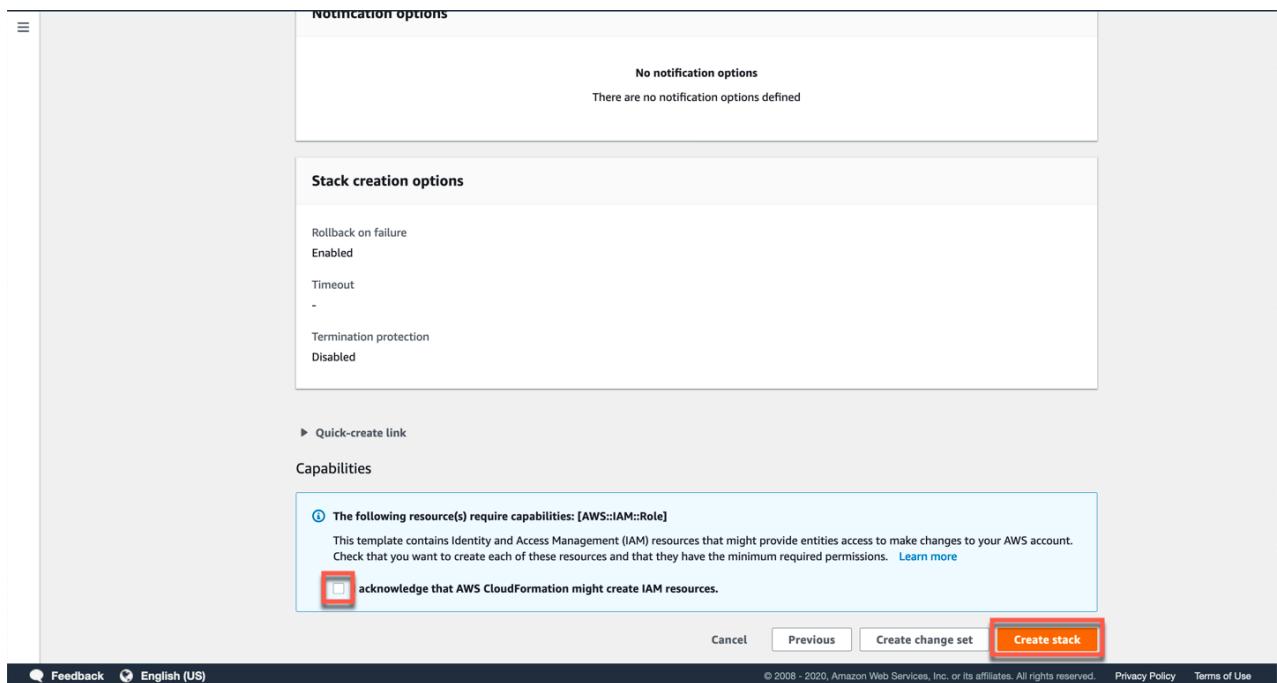
Advanced options

You can set additional options for your stack, like notification options and a stack policy. [Learn more](#)

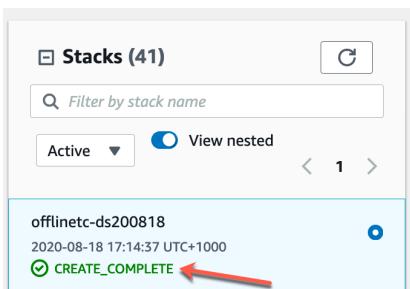
- ▶ **Stack policy**
Defines the resources that you want to protect from unintentional updates during a stack update.
- ▶ **Rollback configuration**
Specify alarms for CloudFormation to monitor when creating and updating the stack. If the operation breaches an alarm threshold, CloudFormation rolls it back. [Learn more](#)
- ▶ **Notification options**
- ▶ **Stack creation options**

Cancel Previous Next

Scroll to the bottom of the screen, select the checkbox and click *create stack*.



Once your stack has been successfully created (it usually takes a few minutes) you will see the below confirmation.



3.6.2 Create a PUT event for your S3 bucket

In your AWS account, go to S3. Search for and locate the S3 bucket that call recordings from your Connect instance are being saved in (i.e. the S3 bucket that you entered in the CloudFormation template).

Click on *properties*.

The screenshot shows the Amazon S3 Properties tab selected. It displays a list of files in a table format. The columns are Name, Last modified, Size, and Storage class. There are two files listed: 'connect' and a file with a blurred name. The 'connect' file was modified on May 10, 2020, at 4:42:39 PM GMT+1000, is 1.6 KB, and is in the Standard storage class. The table has sorting and filtering options at the top.

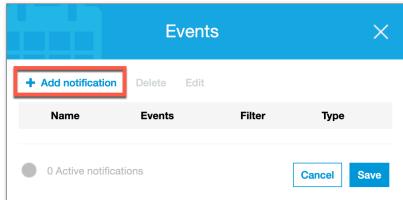
Scroll down and click on events.

The screenshot shows the Advanced settings section in the Amazon S3 Properties tab. It includes several configuration options:

- Object lock:** Prevent objects from being deleted. Status: Disabled.
- Tags:** Use tags to track your cost against projects or other criteria. Status: 0 Tags.
- Transfer acceleration:** Enable fast, easy and secure transfers of files to and from your bucket. Status: Suspended.
- Events:** Receive notifications when specific events occur in your bucket. Status: 0 Active notifications.
- Requester pays:** The requester (instead of the bucket owner) will pay for requests and data transfer. Status: Disabled.

The 'Events' section is highlighted with a red box.

Click on *add notification*.



Enter/select the following:

1. Name: Give the event a name
2. Events: Select *PUT*
3. Send to: Select *SNS Topic*
4. SNS: Select the option that includes the text *rTopicRecordings*

Click on save.

Once you have completed the above steps, each time a call recording is saved in the S3 bucket of your Connect instance, an event will be triggered (every 10 minutes) and a transcription of the call recording along with the customer's speech analysis will be saved in their respective S3 buckets. To find out the names of these S3 buckets, find the stack that you created in CloudFormation and click on *resources*.

Logical ID	Physical ID	Type	Status	Status reason
rBucketComprehend	offlinetc-ds200818.tnc.bucketcomprehend	AWS::S3::Bucket	CREATE_COMPLETE	-
rBucketTranscribe	offlinetc-ds200818.tnc.buckettranscribe	AWS::S3::Bucket	CREATE_COMPLETE	-
rEventRuleComprehendJob	offlinetc-ds200818-rEventRuleComprehendJob-1861FNFT4OMD9	AWS::Events::Rule	CREATE_COMPLETE	-
rEventRuleTranscribeJob	offlinetc-ds200818-rEventRuleTranscribeJob-1DQTIKJHUI00	AWS::Events::Rule	CREATE_COMPLETE	-
rFunctionComprehend	offlinetc-ds200818-tnc-FunctionComprehend	AWS::Lambda::Function	CREATE_COMPLETE	-
rFunctionComprehendRole	offlinetc-ds200818-rFunctionComprehendRole-1388TG9CS1VHB	AWS::IAM::Role	CREATE_COMPLETE	-
rFunctionTranscribe	offlinetc-ds200818-tnc-FunctionTranscribe	AWS::Lambda::Function	CREATE_COMPLETE	-
rFunctionTranscribeRole	offlinetc-ds200818-rFunctionTranscribeRole-1KIO6BD9PINJO	AWS::IAM::Role	CREATE_COMPLETE	-
rPermForBucketTranscribe	offlinetc-ds200818-rPermForBucketTranscribe-7SSVABPJZD86	AWS::Lambda::Permission	CREATE_COMPLETE	-

3.7 Voice biometrics

We have provided sample voice biometric contact flows which can be downloaded [here](#). Using your preferred voice biometrics provider, you can create your own AWS lambdas and interface them with your chosen provider.

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.

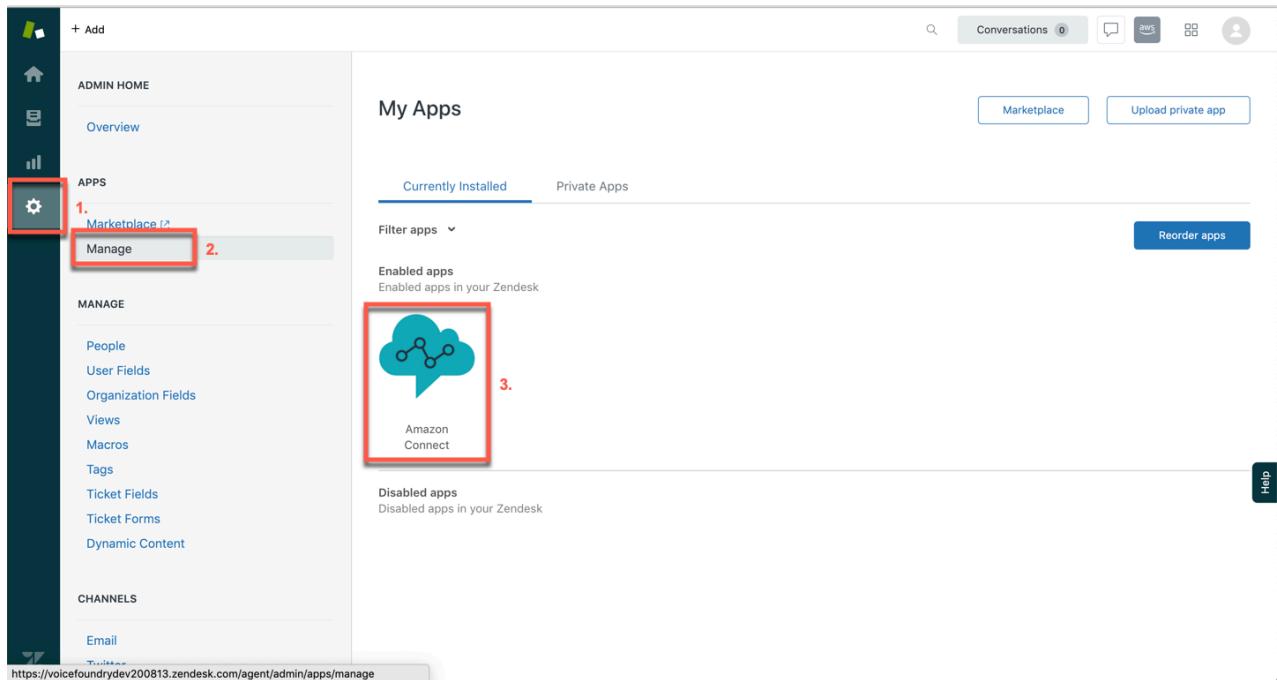
Setting name	Attribute name	Description	Default setting	App setting name	Attribute values
Recent ticket timeout	recent_ticket_timeout	This setting controls whether a recent ticket of a recognised caller should be opened instead of creating a new one. E.g. setting this to 15 means that a new ticket will 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

Setting name	Attribute name	Description	Default setting	App setting name	Attribute values
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.	null	Contact attribute name containing Zendesk Ticket Number.	Zendesk ticket number (entered by caller within IVR)
<p>i NOTE: the name of this attribute can be changed in the corresponding app setting.</p>					
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

Setting name	Attribute name	Description	Default setting	App setting name	Attribute values
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

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.



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.

Setting name	Default setting	Default description
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	
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 Sample contact flows for speech analysis

The following contact flows are provided to you after you run the CloudFormation stack for speech analysis.

Follow the below steps in their respective IVRs to see the customer and agent experiences for the provided contact flows.

5.5.1 DTMF contact flow [Zendesk_SampleContactFlow]

1. Call the phone number that this contact flow is attached to in your Connect instance.
2. When prompted, press 2 for support. [Pressing 1 for Sales takes you directly to queue with no speech analysis enabled]
- 3.

- a. If the phone number you have called from exists within a user profile in your Zendesk instance, you will be prompted with the following options:
 - i. If you have an open ticket:
 1. Press 1 to discuss open ticket
 - a. Transferred to queue. User profile and mentioned ticket will pop for the agent.
 2. Press 2 to discuss another ticket
 - a. Enter a valid ticket number in the IVR
 - i. Transferred to queue. User profile and specified ticket will pop for the agent.
 3. Press 3 to discuss a new issue
 - a. Transferred to queue. User profile will pop for the agent.
 - ii. If you don't have an open ticket:
 1. Press 1 to discuss a new issue
 - a. Transferred to queue. User profile will pop for the agent.
 2. Press 2 for other enquiries.
 - a. Transferred to queue. [no speech analysis enabled]
- b. If the phone number you have called from does not exist within a user profile in your Zendesk instance, you will be transferred directly to queue.

5.5.2 Lex contact flow [Zendesk_SampleLexFlow]

1. Call the phone number that this contact flow is attached to in your Connect instance.
2.
 - a. If the phone number you have called from exists within a user profile in your Zendesk instance, you will be able to respond with the following options:
 - i. If you have an open ticket say one of the following options:
 1. Say yes
 - a. Transferred to queue. User profile and mentioned ticket will pop for the agent.
 2. Say no
 - a. Transferred to queue. User profile will pop for the agent.
 3. Say no, *i'd like to speak to an agent*
 - a. Transferred to queue. User profile will pop for the agent.
 4. Say *I'd like to report a new issue*
 - a. Transferred to queue. User profile will pop for the agent.
 5. Say *I'd like to upgrade my handset*
 - a. Customer will hear prompt based on the above intent about a promotional deal. Transferred to queue. User profile will pop for the agent.
 6. Say *I'd like to reset my password*
 - a. Instructions are automatically sent to the email address set in your Zendesk user profile. Call not routed to agent. New ticket

automatically created in Zendesk showing public response to customer.

ii. If you don't have an open ticket say one of the following options:

1. Say *no, i'd like to speak to an agent*
 - a. Transferred to queue. User profile will pop for the agent.
 2. Say *I'd like to report a new issue*
 - a. Transferred to queue. User profile will pop for the agent.
 3. Say *I'd like to upgrade my handset*
 - a. Customer will hear prompt based on the above intent about a promotional deal. Transferred to queue. User profile will pop for the agent.
 4. Say *I'd like to reset my password*
 - a. Instructions are automatically sent to the email address set in your Zendesk user profile. Call not routed to agent. New ticket automatically created in Zendesk showing public response to customer.
- b. If the phone number you have called from does not exist within a user profile in your Zendesk instance, you will be transferred directly to queue.

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.



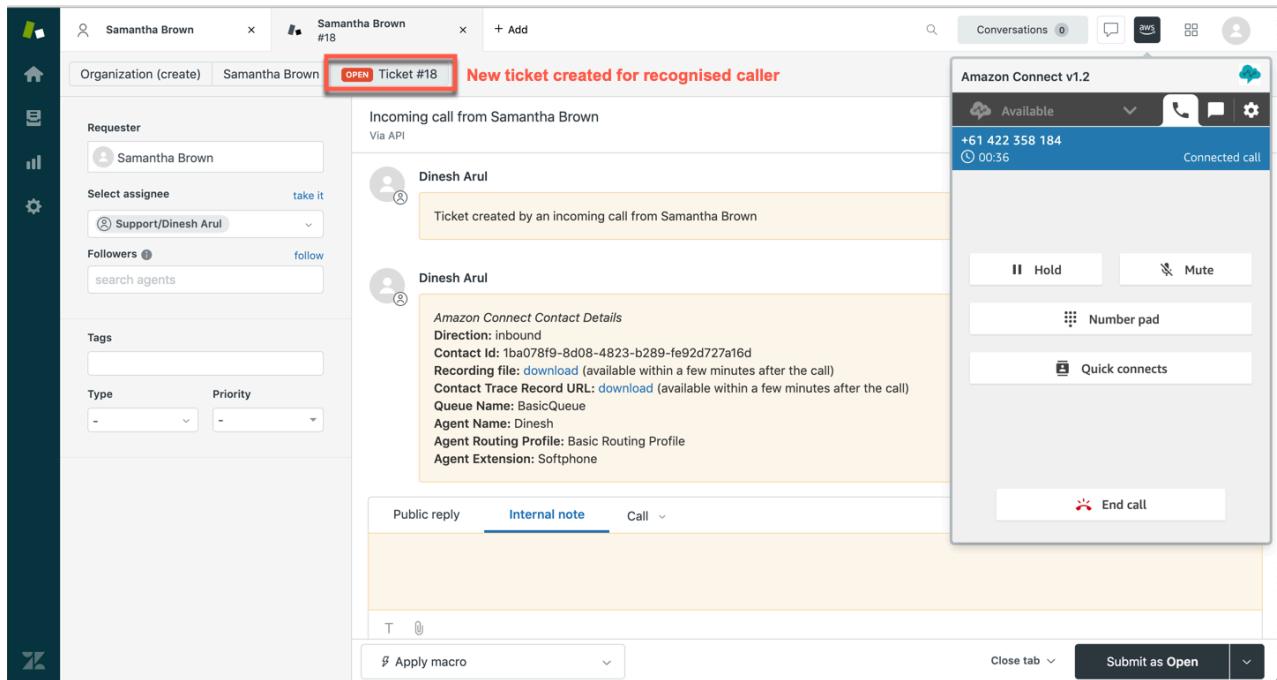
Make sure you enable pop-ups and allow the use of the microphone

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.

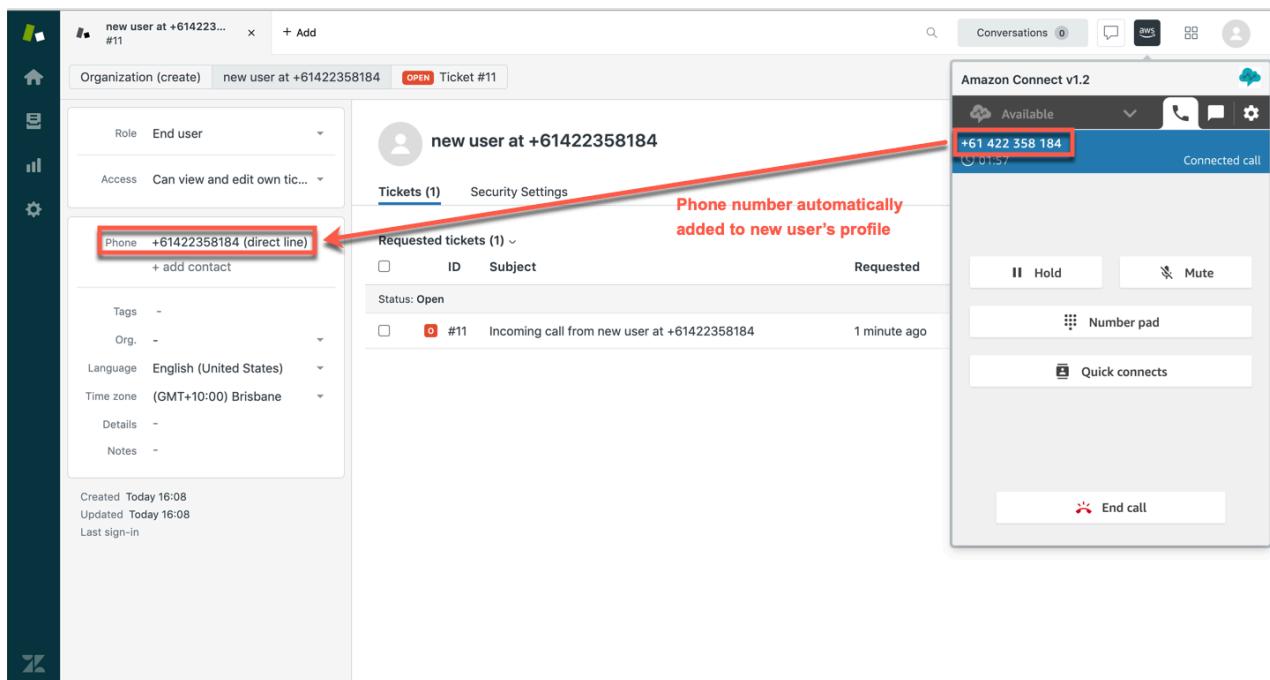
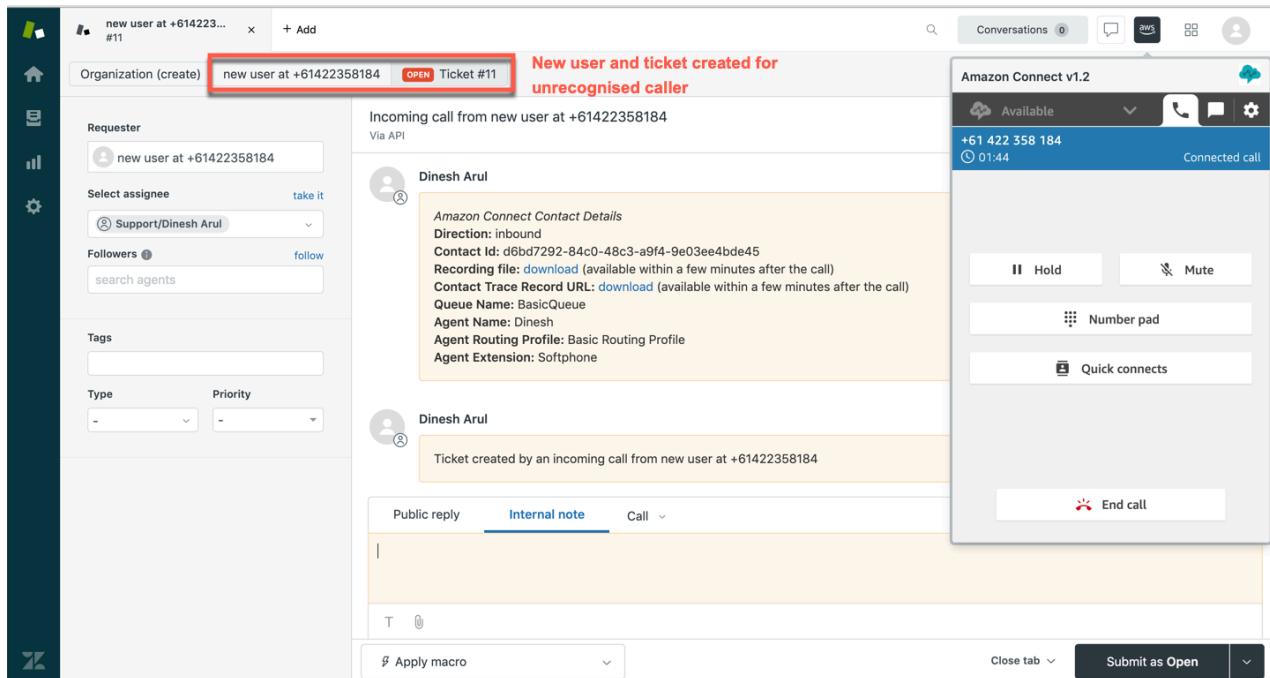


- i If the call is related to an existing ticket, the agent can merge the newly created ticket into the existing one.

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.

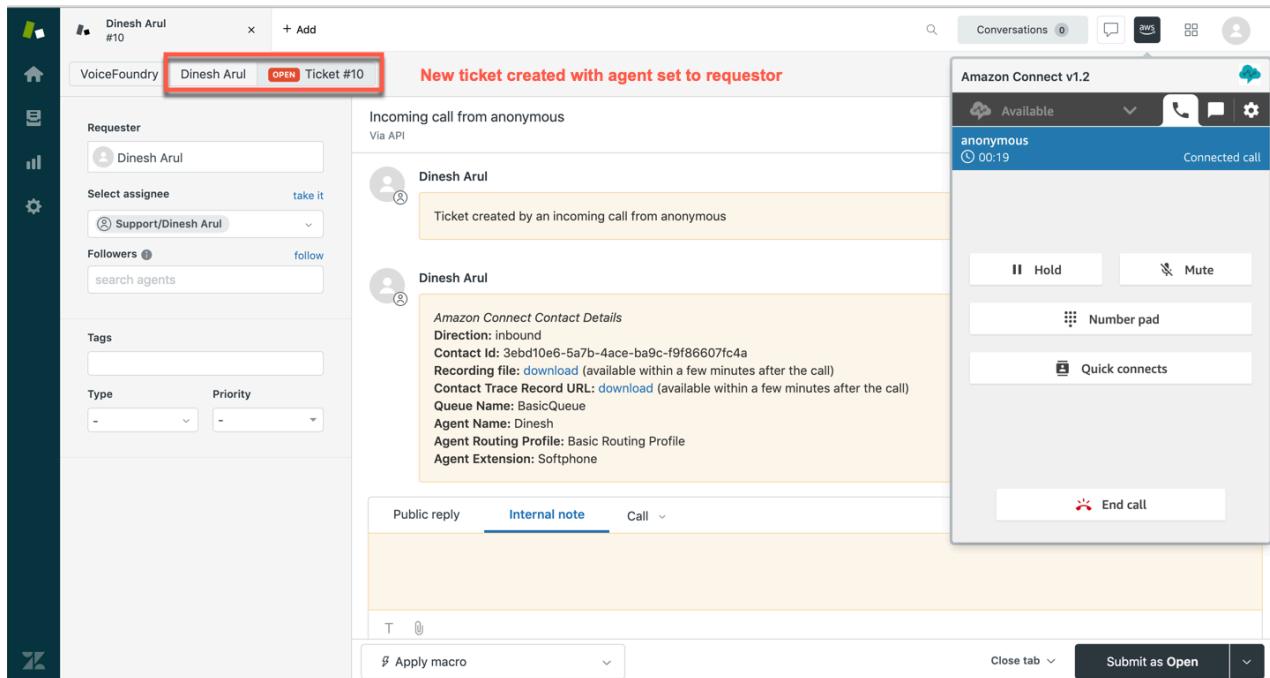
Amazon Connect App for Zendesk v2.1.2 - Installation and User Guide



- 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.



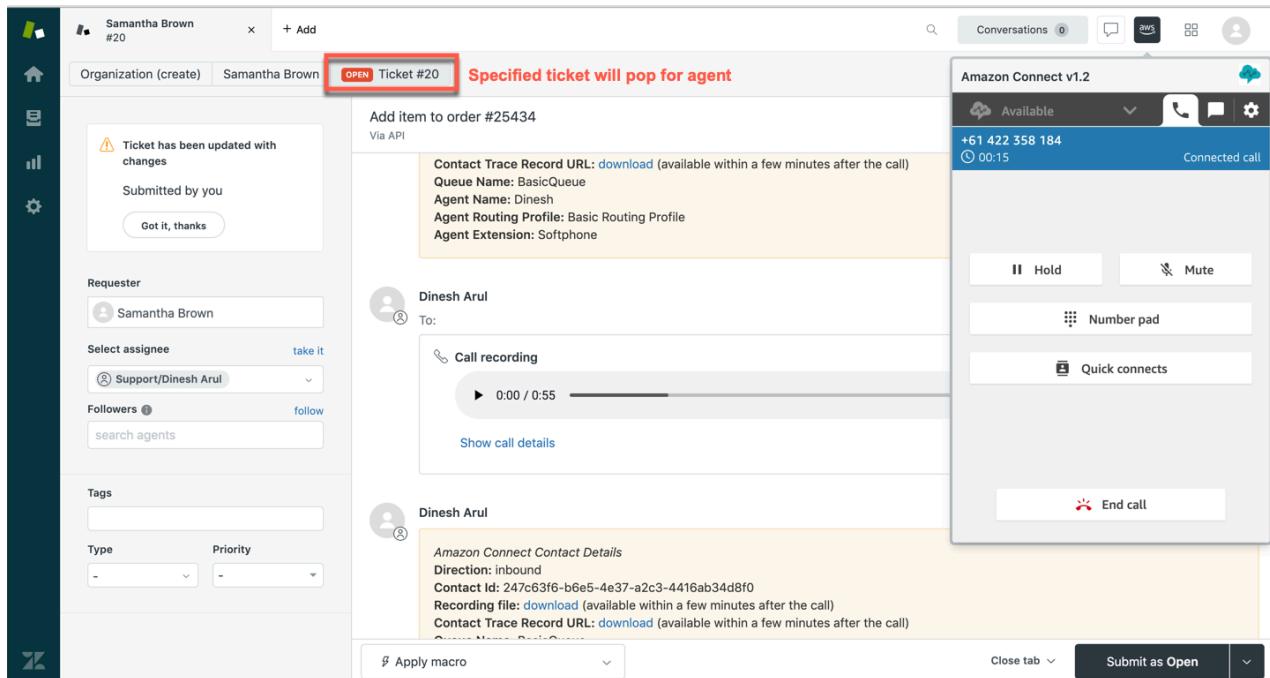
6.1.4 Ticket number attribute

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.



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.

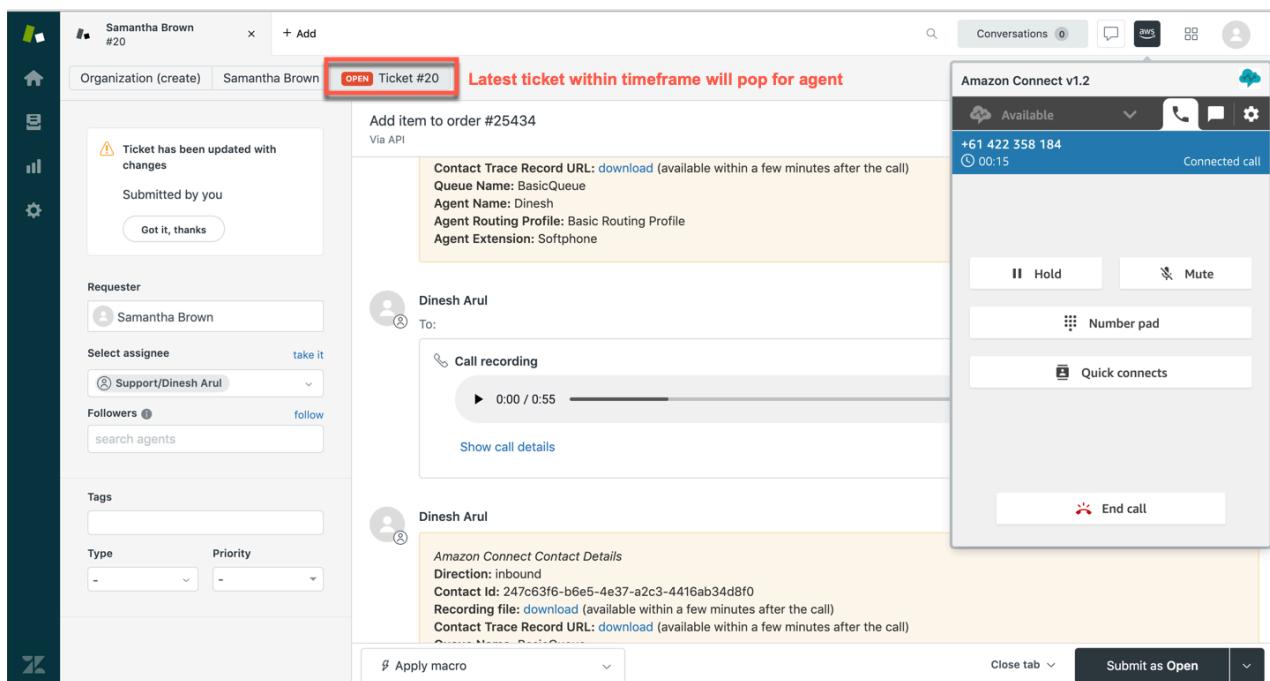
6.1.5 Recent ticket attribute

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.

- ⓘ 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.

- ⓘ 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.

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.

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User's profile is popped

Samantha Brown

Organization (create) Samantha Brown + Add

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 Today 09:41
Last sign-in

Tickets (4) Security Settings

Requested tickets (4) ▾

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

Amazon Connect v1.2

Available +61 422 358 184 00:26 Connected call

Hold Mute Number pad Quick connects

End call

Samantha Brown

Create ticket Attach to current

Create new ticket for user

1. Select an existing ticket

Organization (create) Samantha Brown #20 OPEN Ticket #20 1. Select an existing ticket

Requester Samantha Brown

Select assignee take it

Followers follow

Tags

Type Priority

Dinesh Arul

Ticket created by an incoming call from Samantha Brown

Amazon Connect Contact Details

Direction: inbound
Contact Id: 8080c85a-5c0f-416c-9344-1e4a72c51855
Recording file: [download](#) (available within a few minutes after the call)
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:

Call recording 0:00 / 0:55

End call

Samantha Brown

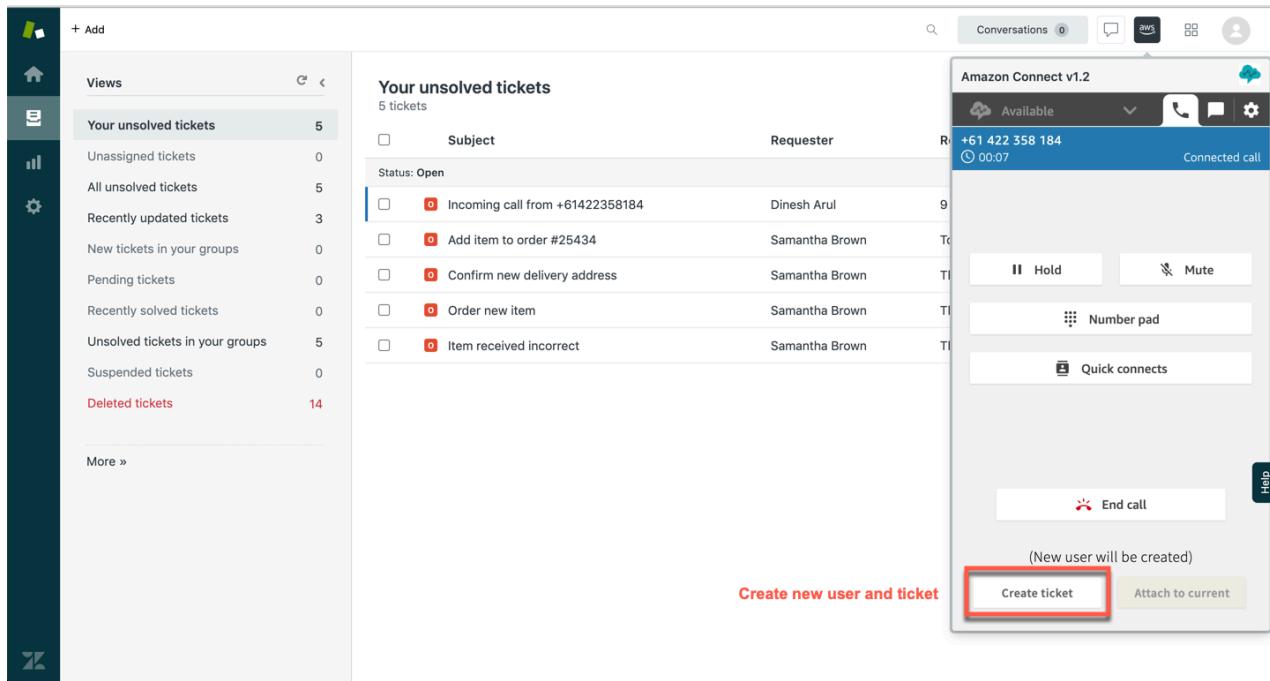
Create ticket Attach to current

2. Attach to existing ticket

Close tab Submit as Open

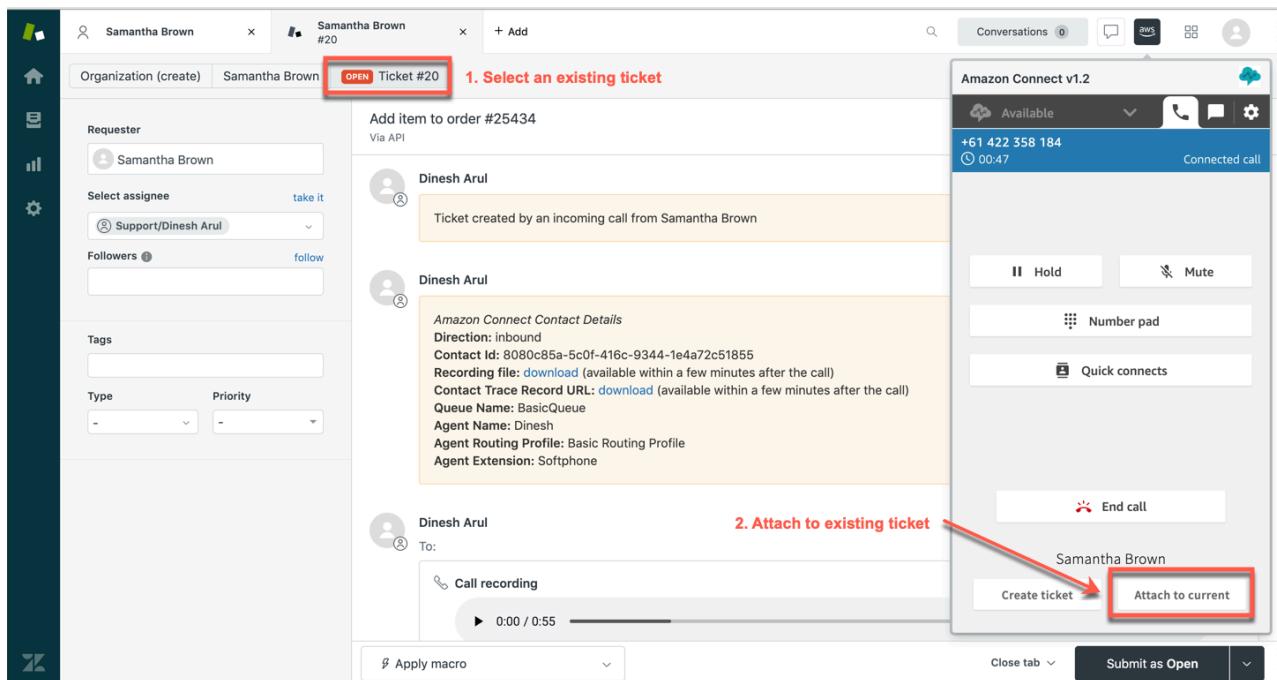
6.2.2 Unrecognised caller

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.



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.

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Your unsolved tickets
4 tickets

	Subject	Requester	Requester
Status: Open			
	Add item to order #25434	Samantha Brown	Toda
	Confirm new delivery address	Samantha Brown	Thur
	Order new item	Samantha Brown	Thur
	Item received incorrect	Samantha Brown	Thur

Create new ticket with agent set to requestor

Create ticket

New ticket created with agent set to requestor

Dinesh Arul #10

VoiceFoundry Dinesh Arul OPEN Ticket #10

Requester: Dinesh Arul

Select assignee: take it

Followers: follow

Tags:

Type: - **Priority**: -

Amazon Connect Contact Details

- Direction: inbound
- Contact Id: 3ebd10e6-5a7b-4ace-ba9c-f9f86607fc4a
- Recording file: [download](#) (available within a few minutes after the call)
- 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

Public reply **Internal note** **Call**

Apply macro

Close tab **Submit as Open**

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.

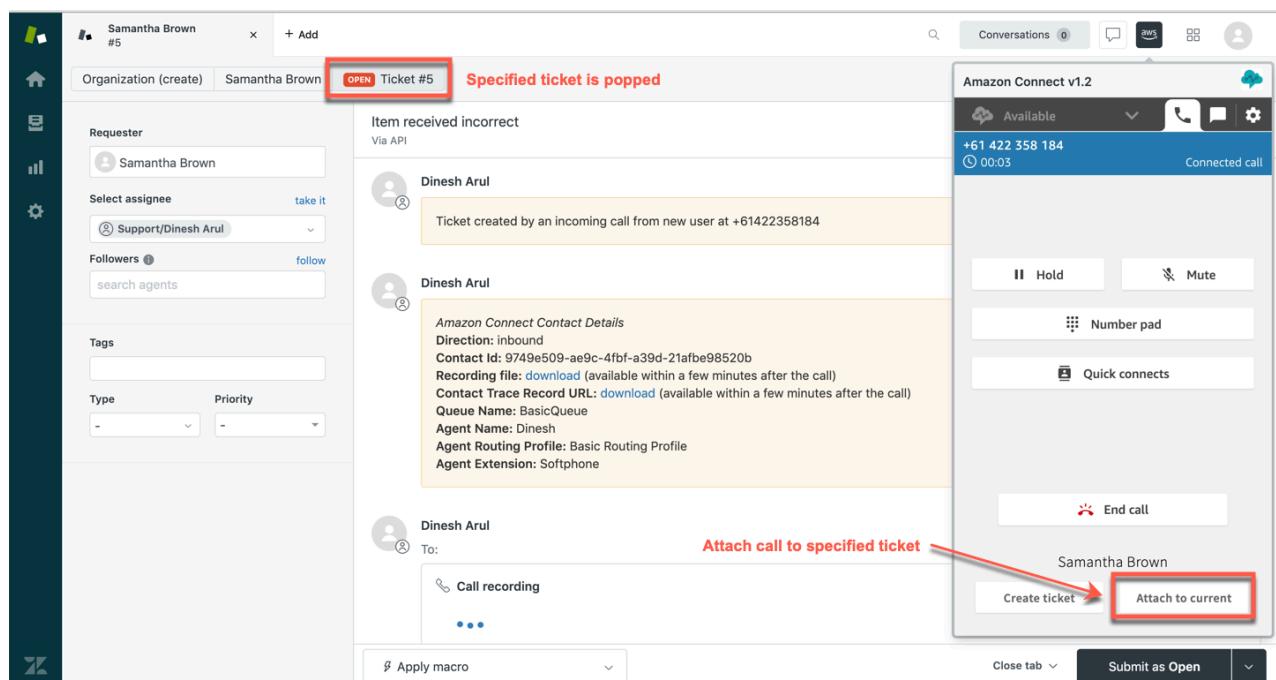
6.2.4 Ticket number attribute

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.

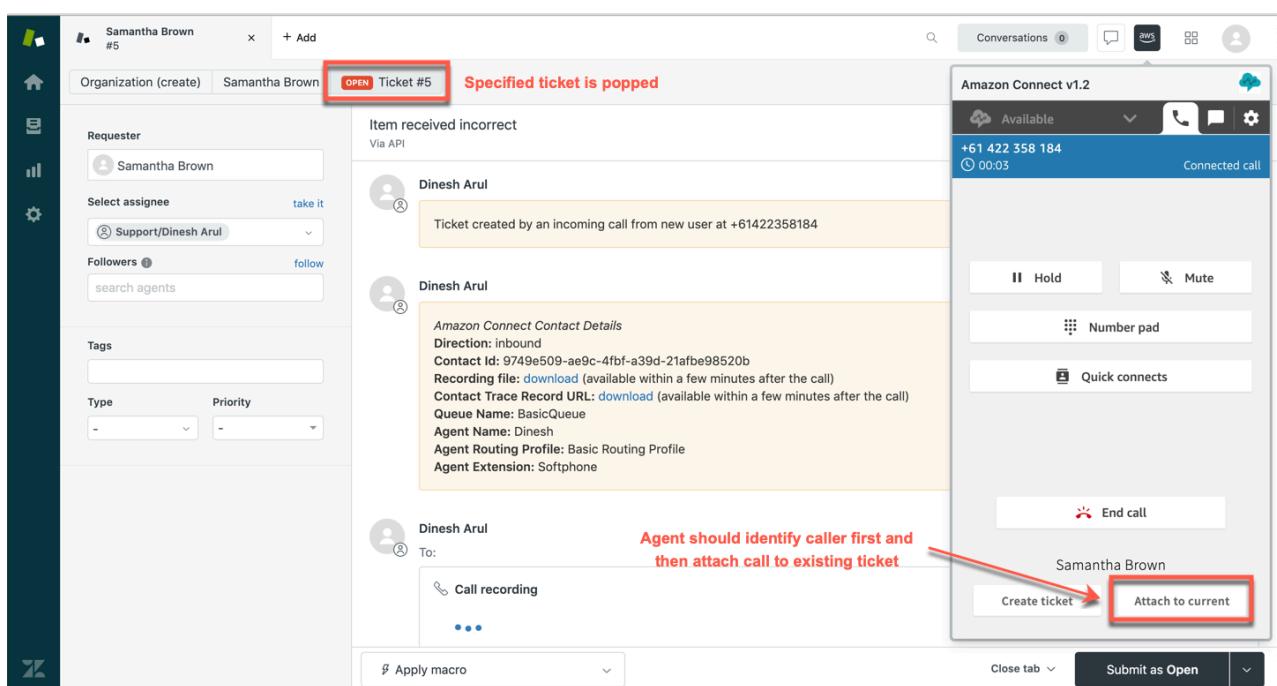


- If the call is not related to the popped ticket, the agent can attach the call to a different ticket or create a new one by clicking on the `create ticket` button.

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.



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.

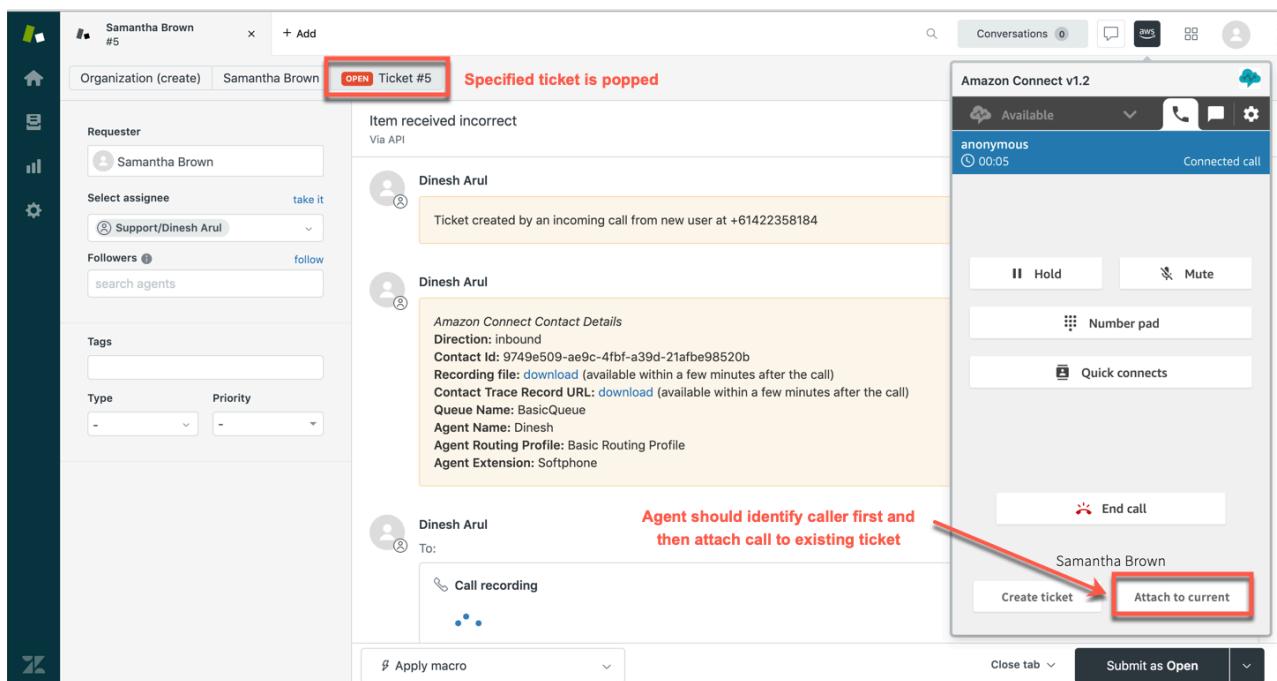
Alternatively, the agent can first identify the caller and if they are an existing user the agent can navigate to the existing user's profile and click on the `create ticket` button to create a ticket for that user. The contact number is automatically added to the user's profile.

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.

(i) 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.



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.

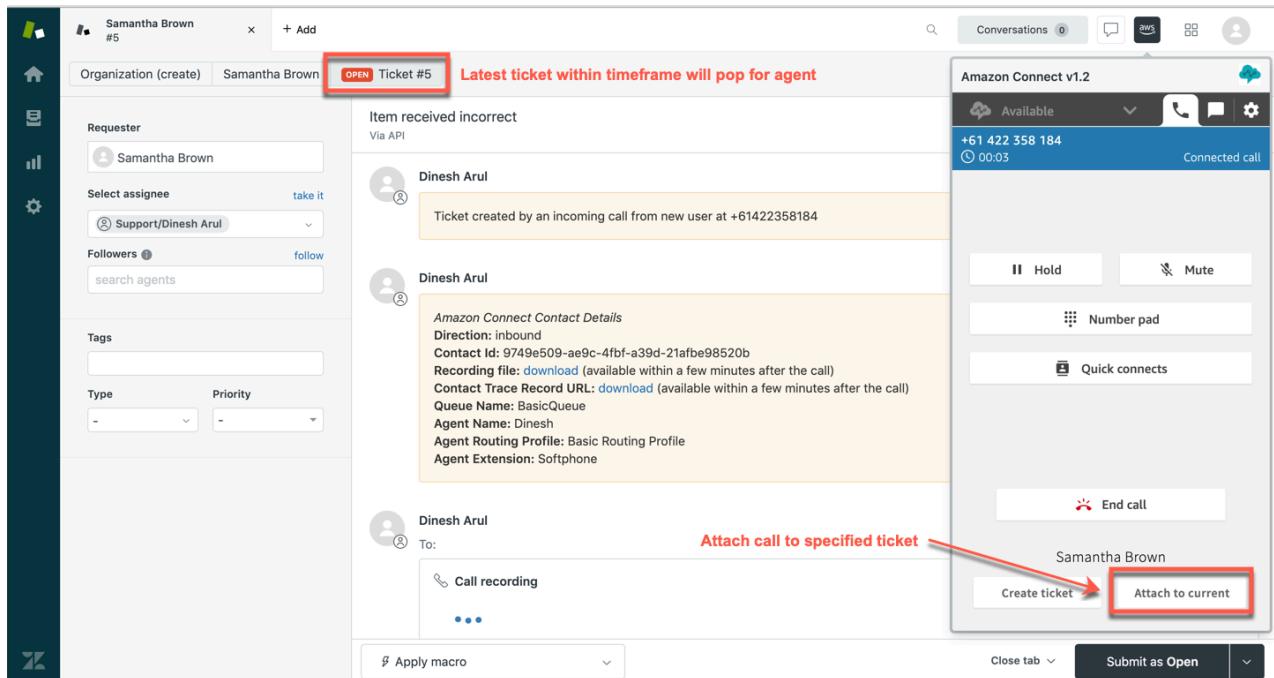
The agent may also establish if the call relates to one of the user's existing tickets and attach the call to it by opening the ticket and then clicking on the `attach to current` button.

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.



- 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.

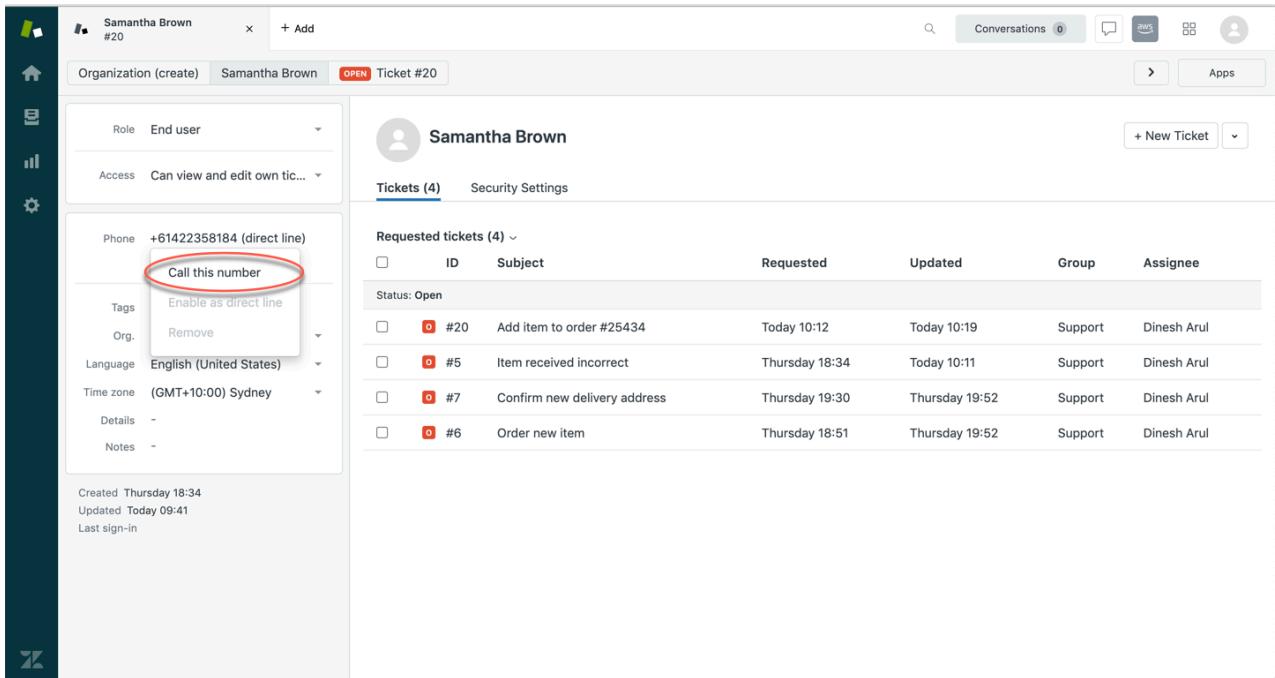
If an agent answers a call from a recognised number and the caller has a recently created or updated ticket outside of the specified timeframe, that user's profile is popped and the agent has the option of either clicking on the create ticket button to create a ticket for that user or if the call relates 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

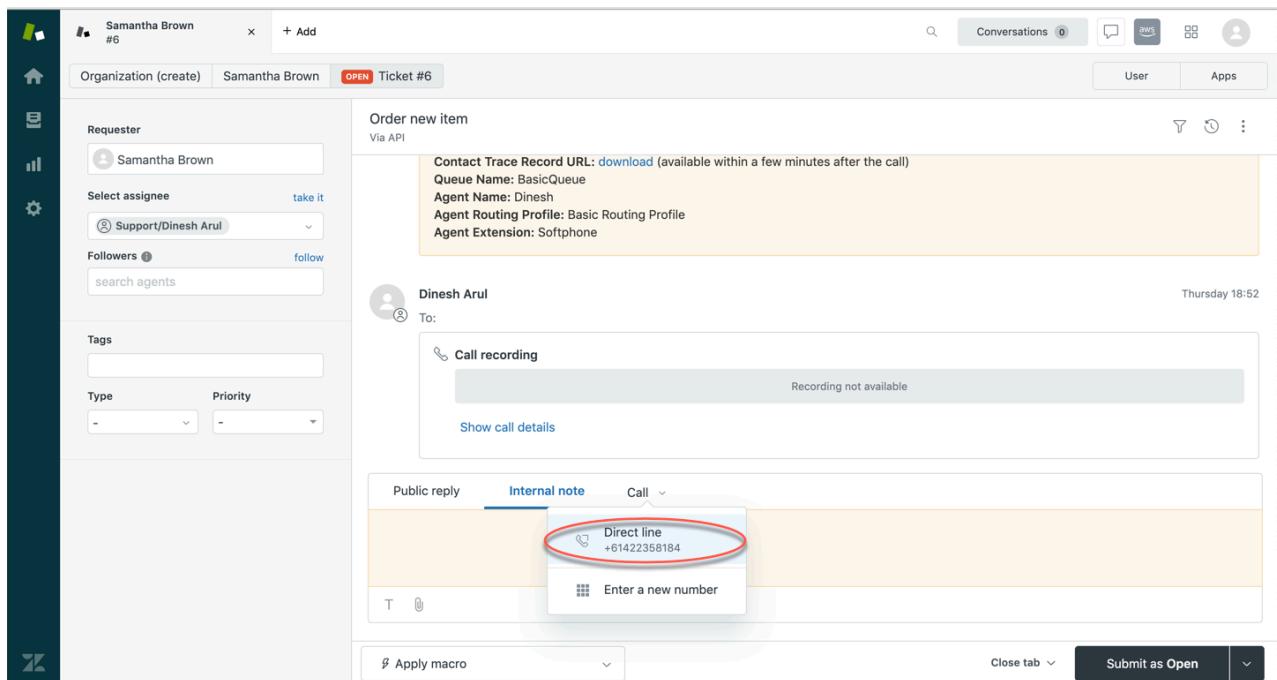
To make an outbound call from a user profile, click on the user's phone number and select **call this number**. A new ticket will automatically be created for that user.



The screenshot shows the Zendesk user profile for Samantha Brown (#20). On the left, there is a sidebar with various icons. The main content area displays Samantha's profile information, including her role as an end user and her access level. Her phone number is listed as +61422358184 (direct line). A context menu is open over this phone number, with the option "Call this number" highlighted by a red circle. Below the profile, there is a section for "Requested tickets (4)" which lists four open tickets with details like ID, Subject, Requested, Updated, Group, and Assignee. The interface includes standard Zendesk navigation elements like a search bar, conversations, and apps.

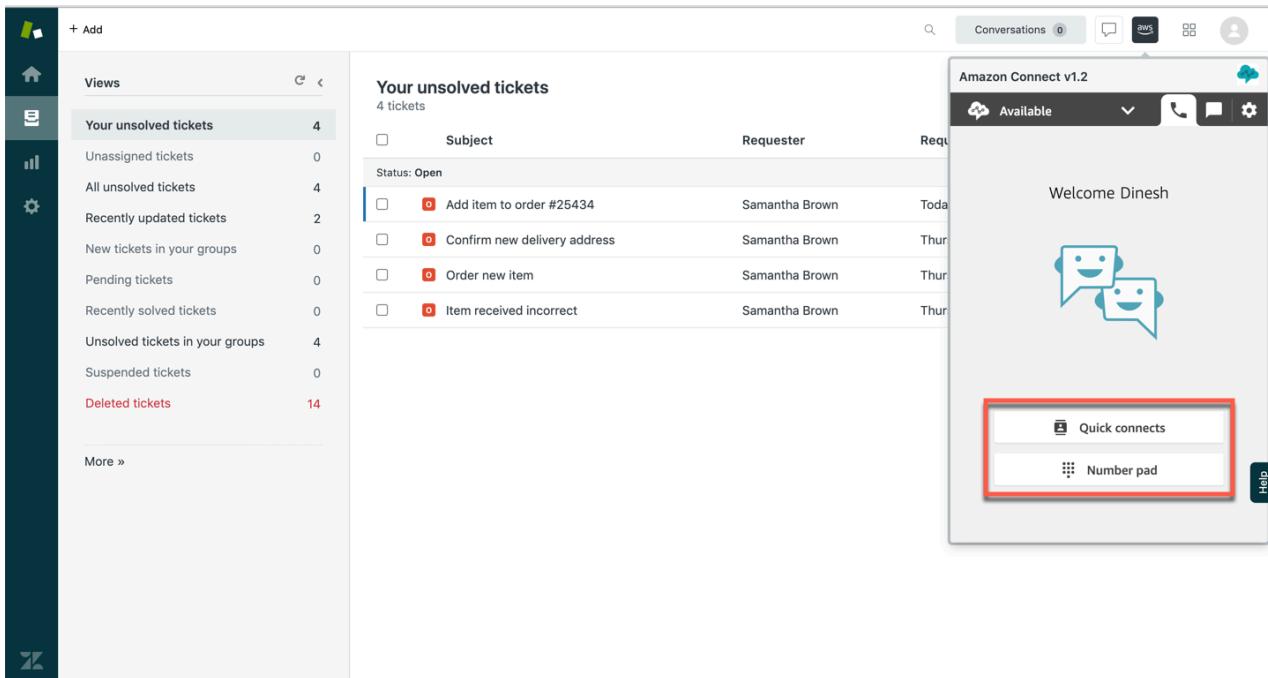
6.3.2 Zendesk ticket

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.



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.

Samantha Brown
#20

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

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)

ID	Subject	Requested	Upd
#32	Outgoing call to Samantha Brown	9 minutes ago	9 mi
#20	Add item to order #25434	Yesterday 10:12	Yest
#5	Item received incorrect	Thursday 18:34	Thur
#7	Confirm new delivery address	Thursday 19:30	Thur
#6	Order new item	Thursday 18:51	Thur

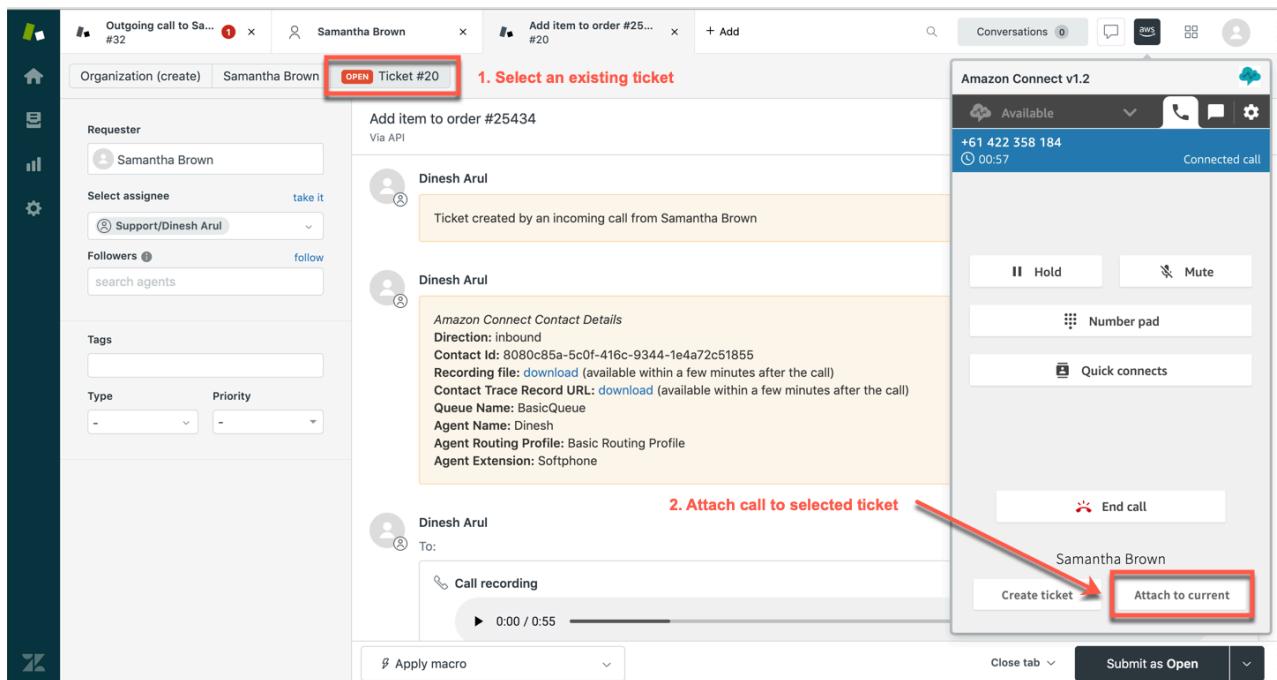
Amazon Connect v1.2

Available +61 422 358 184 00:24 Connected call

Hold Mute Number pad Quick connects End call

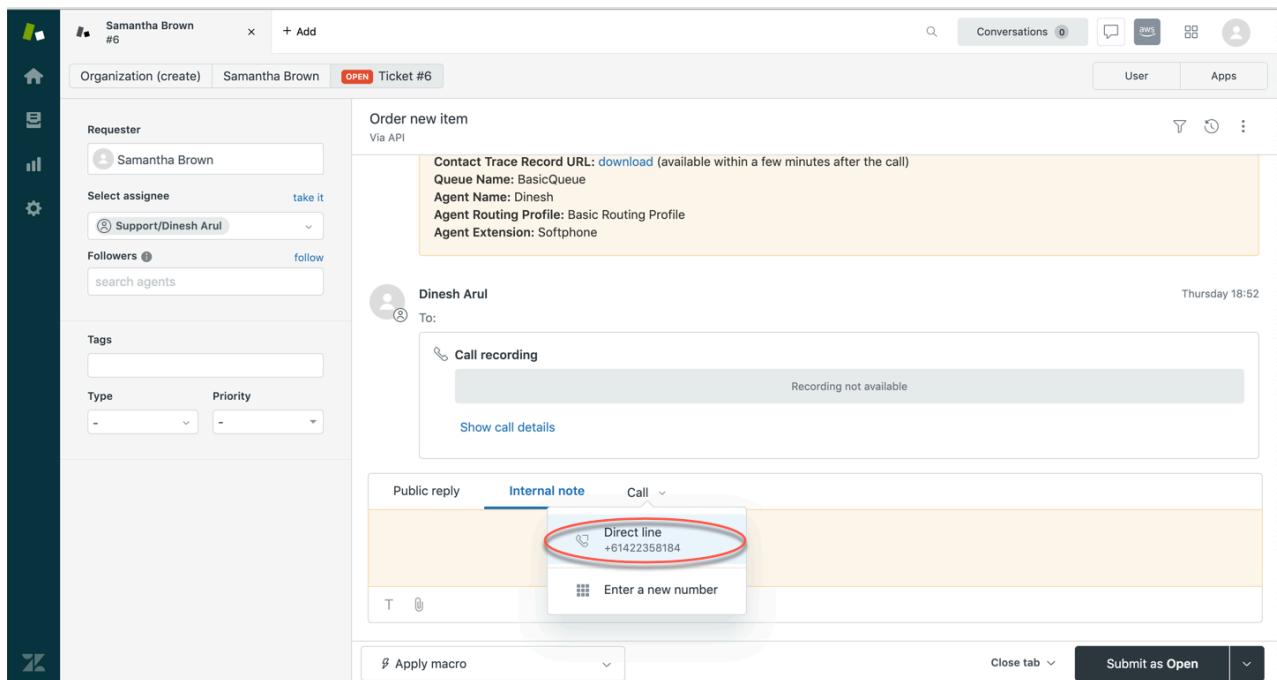
Samantha Brown

Create ticket for user Create ticket Attach to current



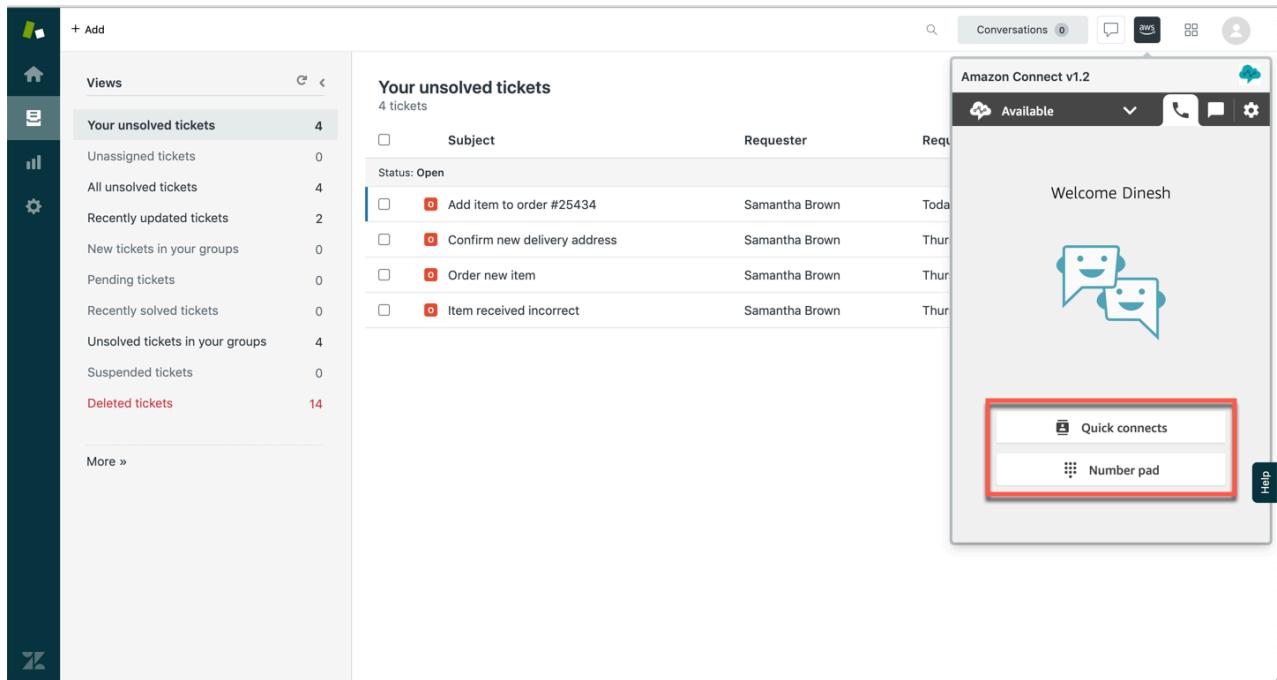
6.4.2 Zendesk ticket

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.



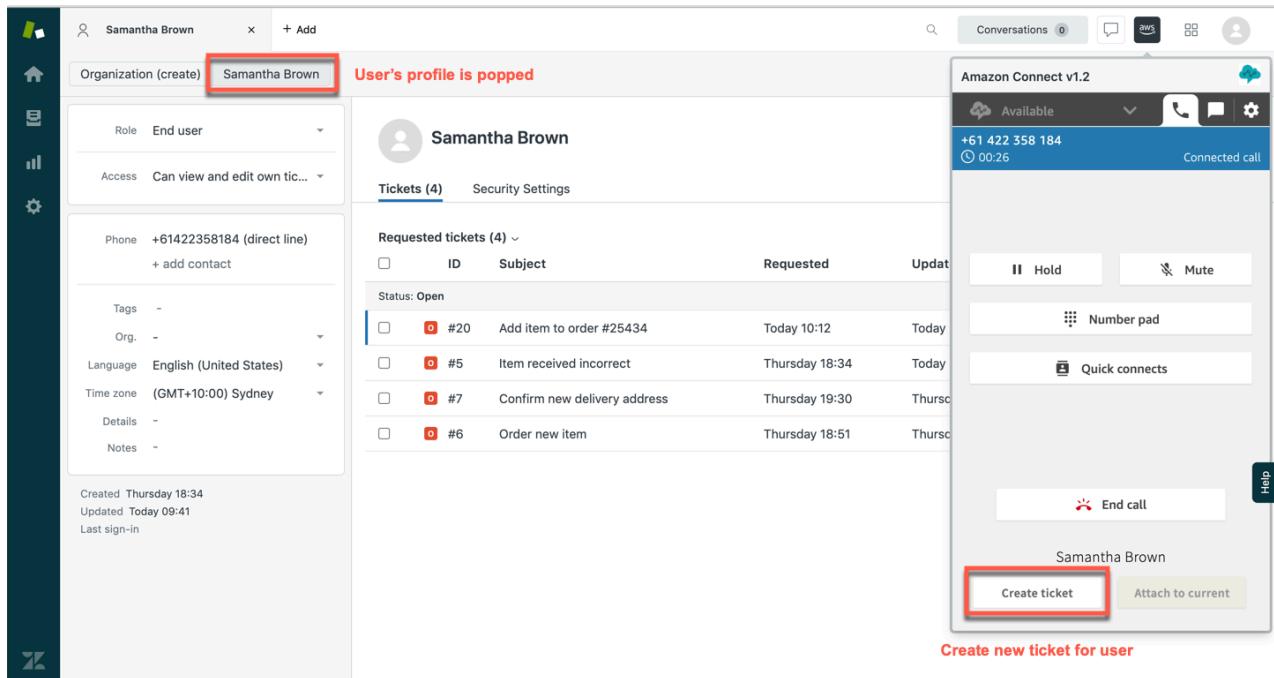
6.4.3 Connect softphone

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.



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

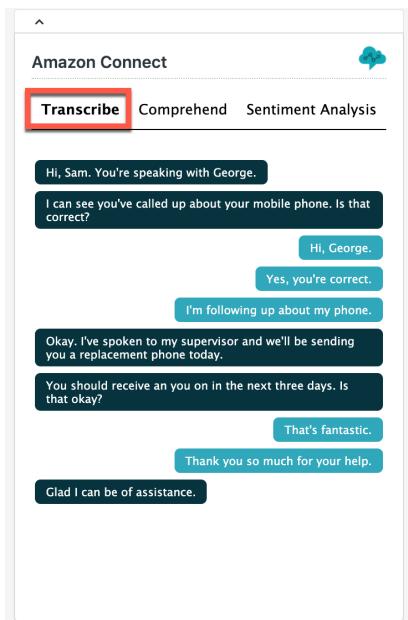
scenario only agent #2's call details will get attached to the ticket. The attribute `force_ticket_creation` will also need to be set to `false` for this to apply.

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 Real-time speech analysis

If you have enabled advanced speech analysis, the speech analysis mini-app will appear on the right side bar of your Zendesk instance each time an agent is on a call. During the call the mini-app will display the following.

6.6.1 Real-time transcription



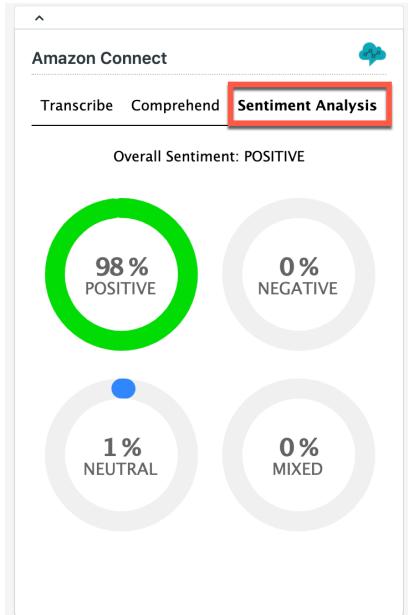
6.6.2 Text comprehension

The screenshot shows the 'Comprehend' tab selected in the top navigation bar. Below it, there are two tabs: 'Entities' and 'Key phrases'. A search bar is present above a table. The table has two columns: 'Key phrase' and 'Confidence'. The data is as follows:

Key phrase	Confidence
Sam	1
George	1
your_mobile_phone	1
my_phone	1
my.supervisor	1
a_replacement_phone	1
today	0.99
the_next_three_days	0.99
your_help	0.99

Clicking on a key phrase will perform a search of that phrase within your Zendesk Guide.

6.6.3 Customer sentiment analysis



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. <div style="border: 1px solid #fca; padding: 10px; margin-top: 10px;">⚠ The agent must still be on the call when an attribute is either updated or created for it to get attached to a ticket.</div>
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.