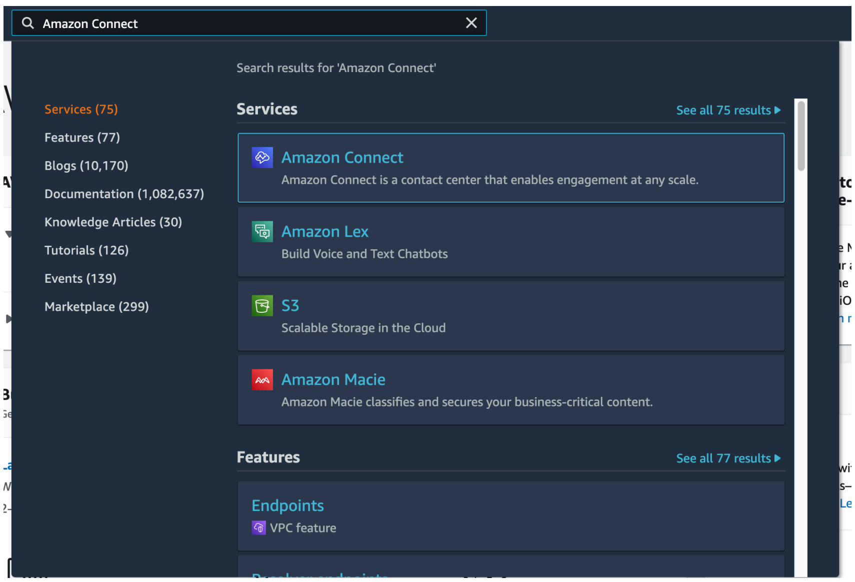
How to create and setup an Amazon Connect Instance - Tom (Xin Sheng) Zhang

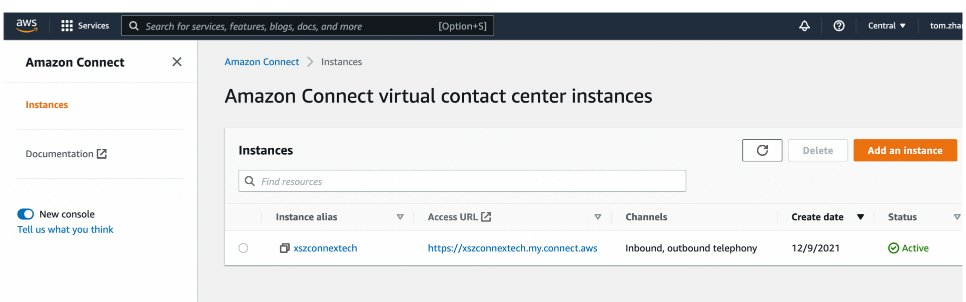
<u>IN AMAZON WEB SERVICES</u>

1 - Create an AWS account or log into an existing account
- The main hub for amazon services, will ask a bunch of questions, including billing info
- Just follow the steps
- Search for Amazon Connect in the search bar, it will be the top result under services



- Click on the Amazon Connect service to go to the Amazon Connect Dashboard

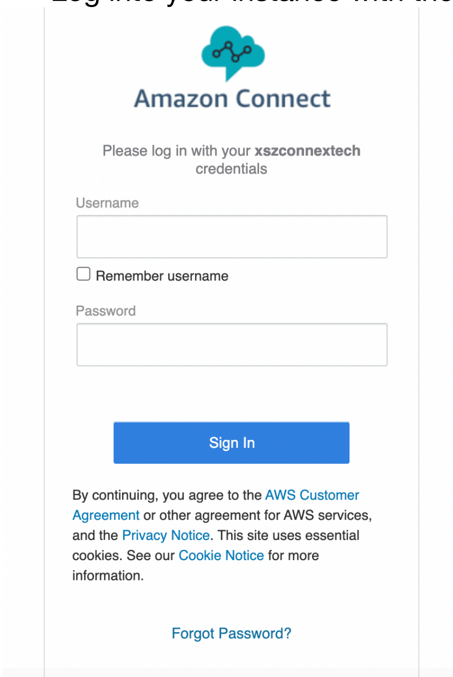
<u>IN AMAZON CONNECT DASHBOARD</u>



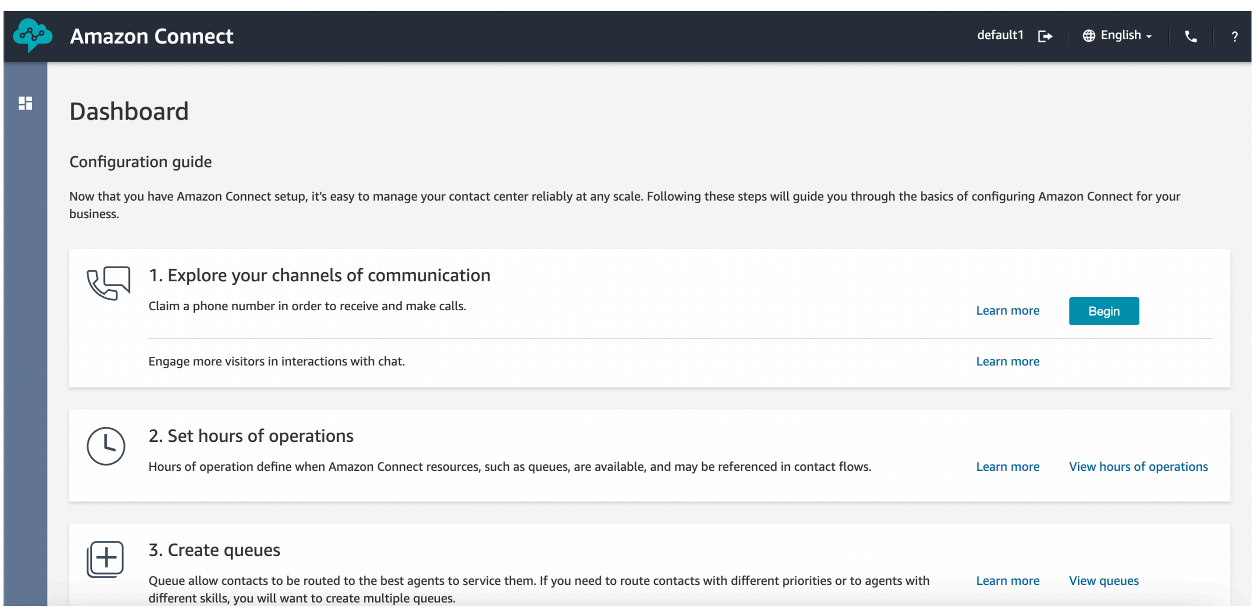
2 - Create an Amazon Connect Instance
- Navigate to instances if not already there and click “Add an Instance”
- Amazon will walk you through the creation process.
  - Set Identity, it's fine to store users in Amazon connect unless you have a special place for them
    - Create the Access URL for your instance. Remember this to access the instance
  - Add administrator: to edit your instance, remember the username and password for step 3 onwards

- Set Telephony: Only need to allow incoming calls, but it's fine to leave it as default with both incoming and outgoing calls
- Data storage, ok to leave as default and click next
- For review and create, look over your work and create the instance when satisfied
- Should appear in your dashboard if all is correct

• Access the instance using the Access URL created in Set Identity
• Log into your instance with the Admin username and password



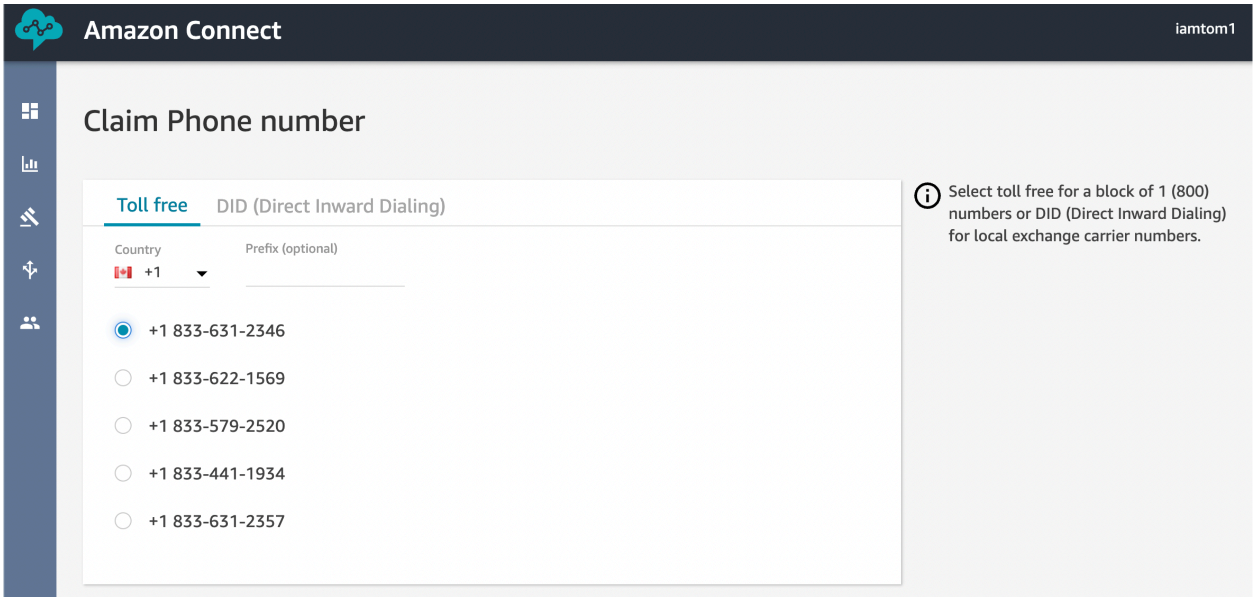
<u>IN THE INSTANCE</u>



3 - Claim a phone number

• When logged in as admin, you should see the dashboard

- Under the top (Explore your channels of communication) in the body of the configuration guide, click “Begin” to navigate to the Manage Phone numbers
- Click Claim a number



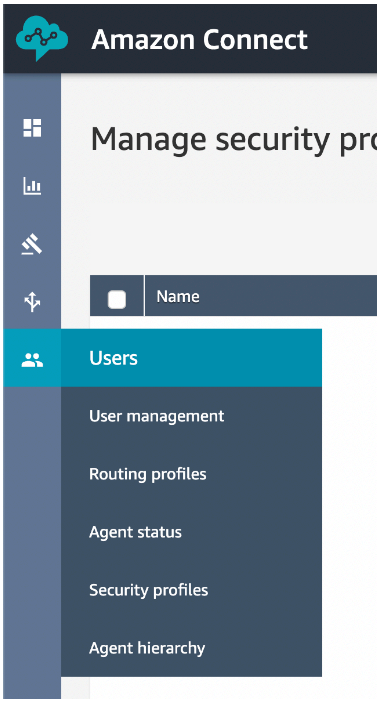
- Choose either DID (Direct internal dialling), or a toll-free 1-800 number,
  - You'll be able to dial both, so for demonstration either is fine, the choice comes later
  - Select a country for a list of numbers,
  - Choose any available number
  - Result should look like this:

Phone Number	Description	Contact flow/IVR
+1 416-941-3514	First Phone Number	Transfer to Sales

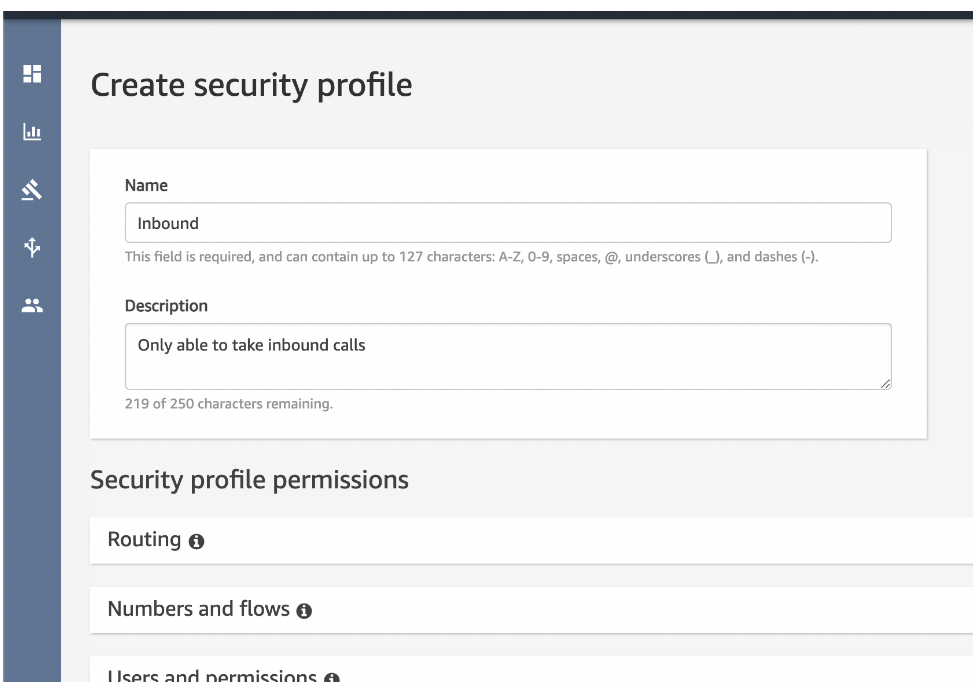
Rows pe

- This number will be referenced from step 6 onwards

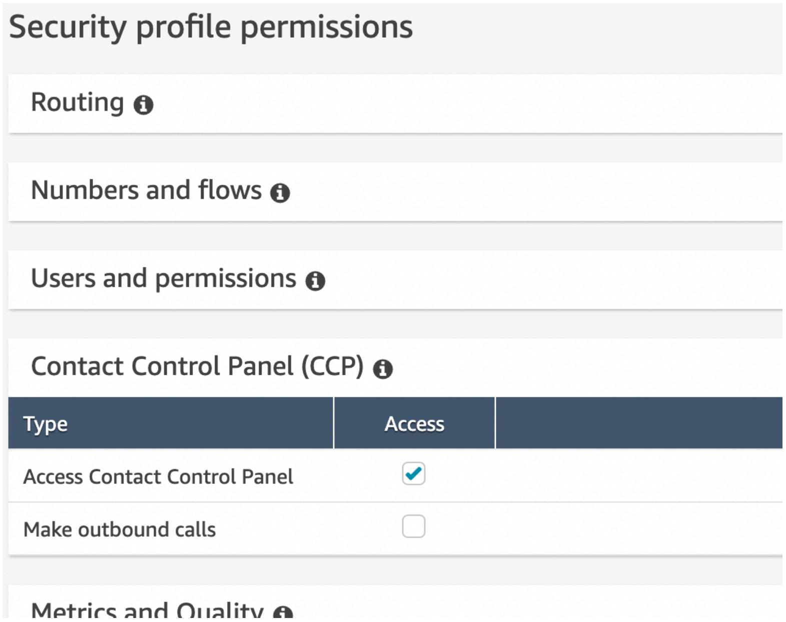
4 - Create a security profile



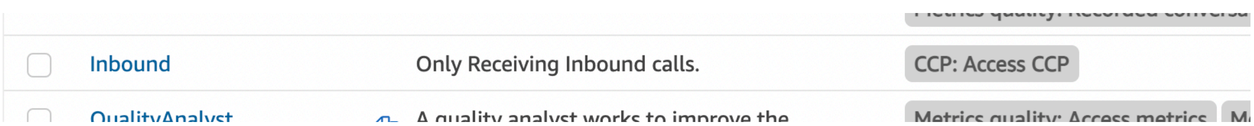
- Under Users, click security profiles
- Ignore the existing profiles
- Click Add new security profile



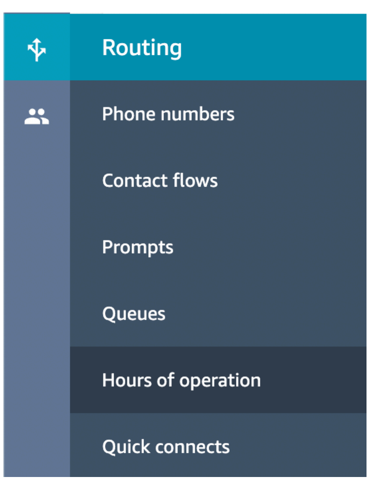
- Give it name: Inbound
-



- To make it only able to access inbound calls, only click the box under Contact Control Panel, “Access contact control panel”
- If successful, the Manage Security Profile screen should have a new profile like this:



5 - Create hours of operations



Under Routing

- Choose "add new hours"
- Like with Security profiles, give it a meaningful name

- Select the relevant timezone, eg “EST”
- Delete Saturday and Sunday by selecting them from the list and click “Remove”
- Select the weekdays and click edit
  - Set the starts to 9am
  - Set the End to 05 pm, click the AM to switch it to PM and PM to switch to AM
- Click save
- Should look like this:

Time zone:

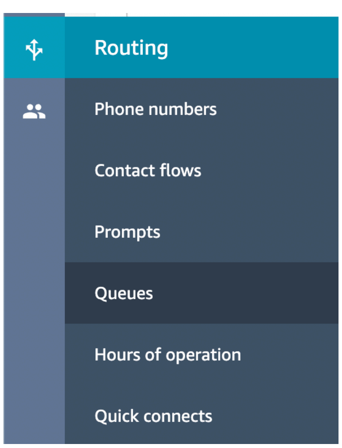
Canada/Eastern

Day	Start	End
Monday	09 : 00 AM	05 : 00 PM
Tuesday	09 : 00 AM	05 : 00 PM
Wednesday	09 : 00 AM	05 : 00 PM
Thursday	09 : 00 AM	05 : 00 PM
Friday	09 : 00 AM	05 : 00 PM

When saved, the hours of operation should look like this

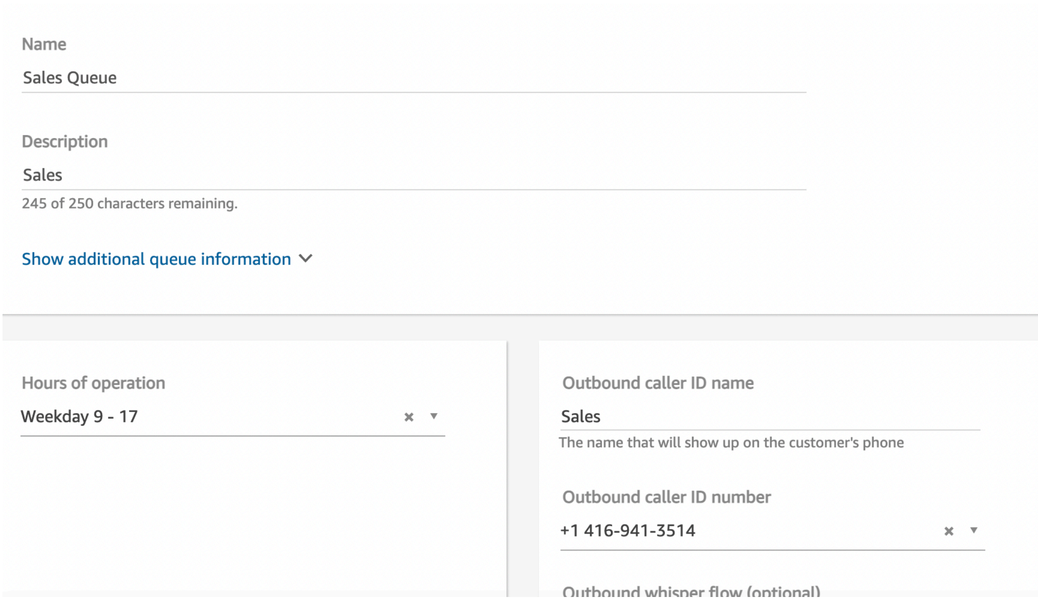
Name	Description	Queue assignment
Weekday 9 - 17	WorkDay hours	Yes

6 - Queues
- This is essentially the entrance to your call center

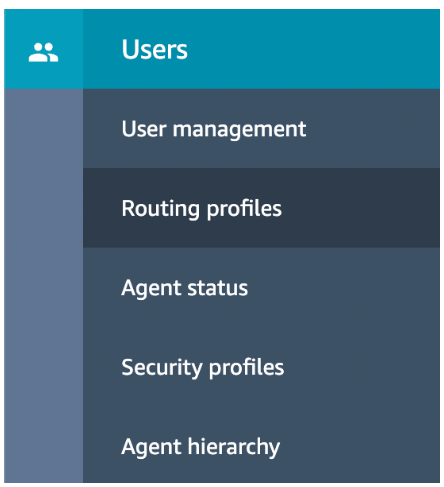


- Click add new queue
- Name it “Sales”
- Set the hours of operation to the one you created in step 5

- Name the outbound called ID to your Sales
- Set the number to the one you claimed in step 3
- Should look like this:

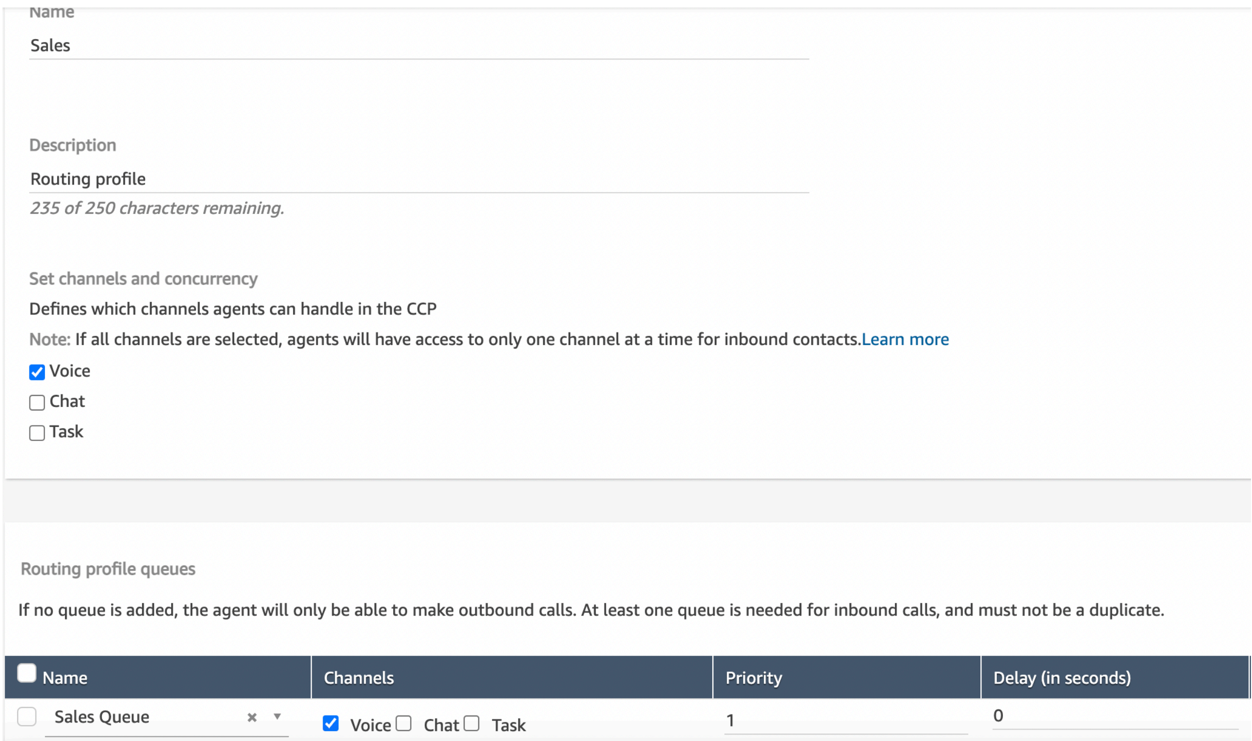


7 - Routing Profiles

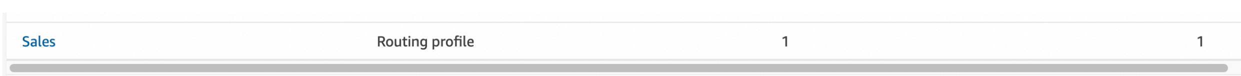


- Under Users
- Click "Add new profile"
- Name it Sales
- Give it a Description
- Set Channels and Concurrency: Set the checkbox for voice only
- Add the queue you created in step 6
- It will fill out the channels according to what you clicked in Set Channels and Concurrency
- Leave everything else as default, Priority at 1, Delay(in seconds) at 0
- Set the default outbound queue to the same queue

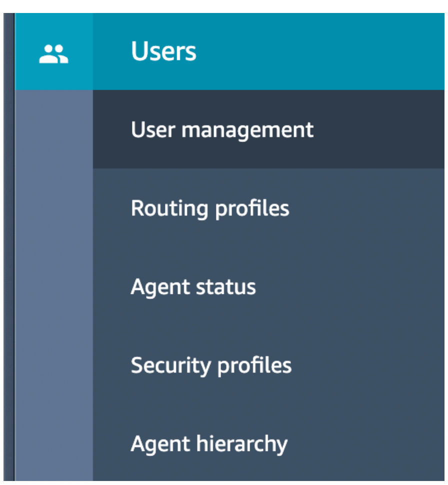
- Should look like this:



- If you did everything right you can click the add new profile button in the top right.
- Should show in the routing profiles

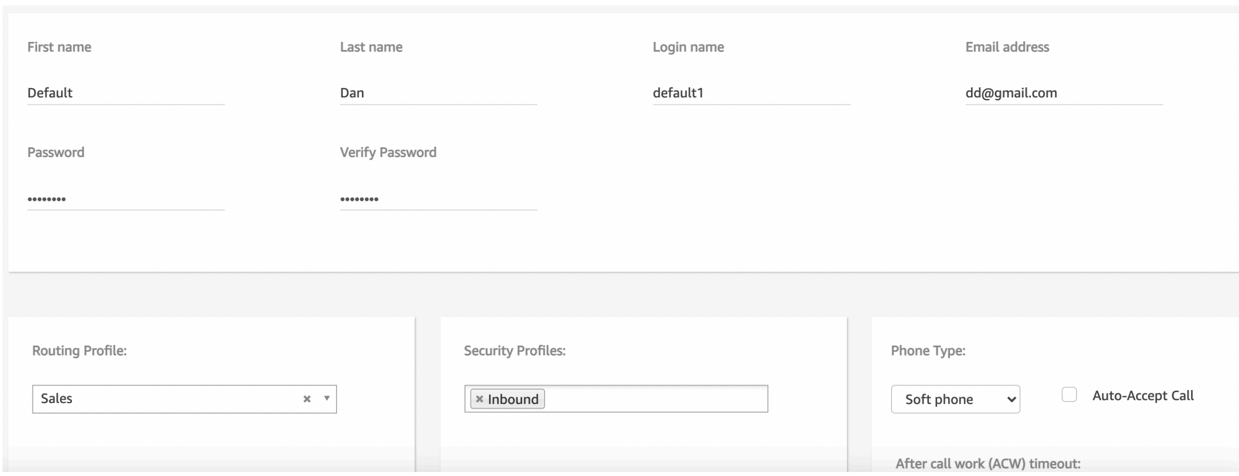


8 - Create an Agent Account



- Make an account for an agent

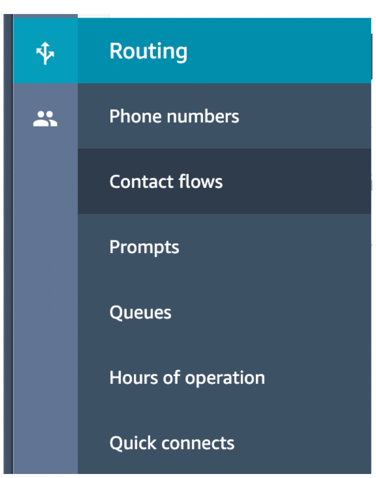
- Add new users
- Create and set up a new user
- Enter the name and login details
- Email for account management and recovery
- **Make sure to remember the login and password for testing later**
- Assign them to the routing profile from step 7 and the security profile from step 4
- Leave phone type as the default, soft phone if you intend to use a computer for the calls
- Should look like this:



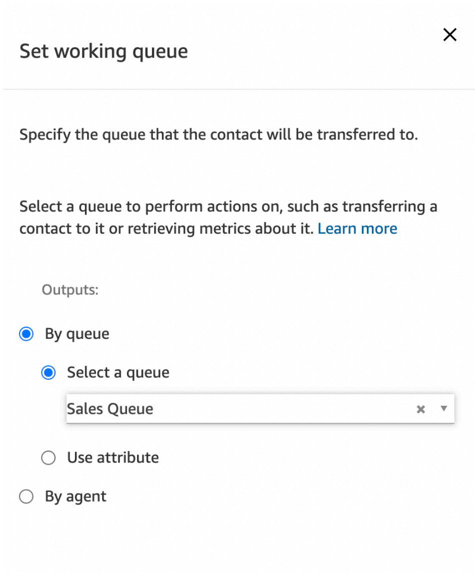
- If everything's correct you can press save at the bottom
- User will appear in user Management alongside your admin

Login name	Name	Routing profile	Security profile	Agent hierarchy
default1	smith, john	Sales	Inbound	—
iamtom1	Zhang, Tom	Basic Routing Profile	Admin	—

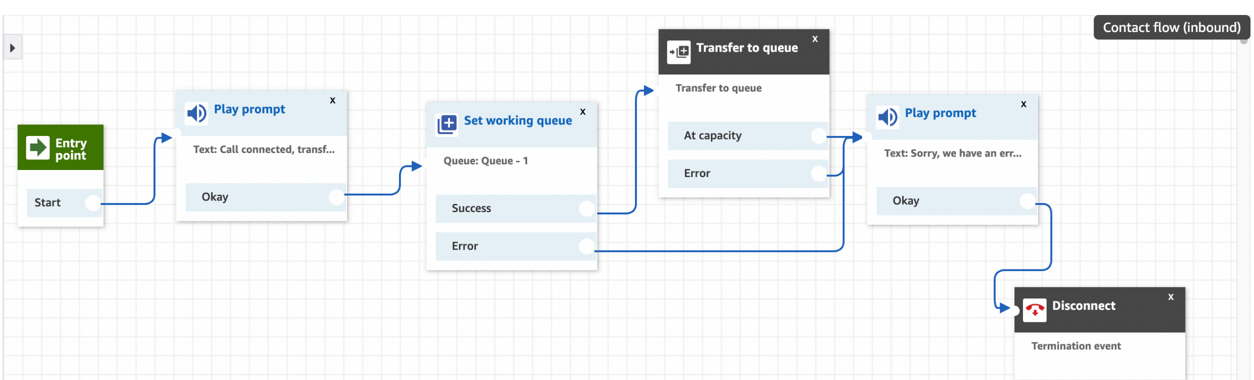
9 - Create a call flow



- Will need to create a new flow
- Give it a name
- Follow the model of the transfer to agent flow
- Needs to have "set working queue" under "Set" and "transfer to queue" under "Terminate/ Transfer" blocks
- Connect entry point to set working queue and set working queue to transfer to queue
- Set the working queue parameters by clicking on the block title



- connect the errors and at capacity to disconnect
- Add some informational “play prompts” from the "Interact" drop down for testing and informational purposes
- Make sure to set the working queue to the queue created in step 6
- Finished product should look like this:



- Save the flow and publish to make the flow live.

TESTING
Call the number you claimed to check if it is working

Log into the agent account you created to answer the call,
- Use the Access URL for the instance, but use the Agent login and password you created in step 8

Make sure you test your microphone and headset to see if the call is going through
The customer will hear some of the default options created with the instance, including hold music while an Agent responds to the call.