

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

IN AMAZON WEB SERVICES

- 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

The screenshot shows the AWS search interface with the query 'Amazon Connect' entered in the search bar. The results are categorized into 'Services' and 'Features'. Under 'Services', 'Amazon Connect' is listed first, described as a contact center that enables engagement at any scale. Other services like Amazon Lex, S3, and Amazon Macie are also listed. Under 'Features', 'Endpoints' is listed as a VPC feature. A sidebar on the left provides links to various AWS categories such as Services, Features, Blogs, Documentation, Knowledge Articles, Tutorials, Events, and Marketplace.

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

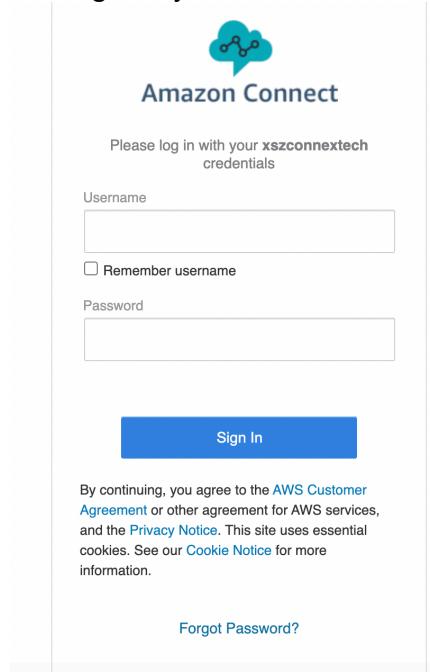
IN AMAZON CONNECT DASHBOARD

The screenshot shows the 'Instances' page of the Amazon Connect dashboard. It displays a table of virtual contact center instances. The table has columns for 'Instance alias', 'Access URL', 'Channels', 'Create date', and 'Status'. One instance is listed: 'xszconnxtech' with 'https://xszconnxtech.my.connect.aws' as the Access URL, 'Inbound, outbound telephony' as the Channel, '12/9/2021' as the Create date, and 'Active' status. There are buttons for 'Delete' and 'Add an Instance'.

2 - Create an Amazon Connect Instance

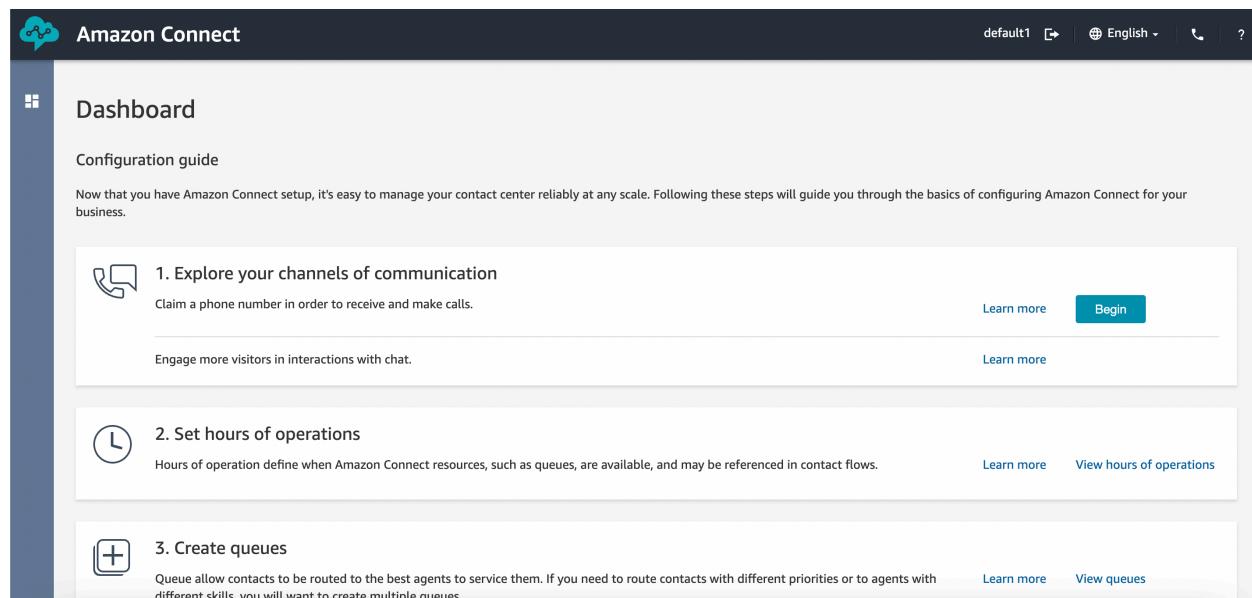
- Navigate to instances if not already there and click “Add an Instance”
- Amazon will walk you through the creation process.
 - Set Identity, it's fine to store users in Amazon connect unless you have a special place for them
 - Create the Access URL for your instance. Remember this to access the instance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



The screenshot shows the Amazon Connect sign-in page. At the top is a logo of a blue cloud with a speech bubble and a magnifying glass. Below it, the text "Amazon Connect" is displayed. A message says "Please log in with your xszconnextech credentials". There are two input fields: "Username" and "Password", each with a corresponding "Remember" checkbox. Below the fields is a large blue "Sign In" button. At the bottom of the page, a note states: "By continuing, you agree to the [AWS Customer Agreement](#) or other agreement for AWS services, and the [Privacy Notice](#). This site uses essential cookies. See our [Cookie Notice](#) for more information." Below this note is a link to "Forgot Password?".

IN THE INSTANCE



The screenshot shows the Amazon Connect dashboard. The top navigation bar includes the "Amazon Connect" logo, user name "default1", language "English", and a help icon. The main sidebar has a "Dashboard" icon and the word "Dashboard". The main content area has a "Configuration guide" section with three steps: 1. Explore your channels of communication (with a phone icon), 2. Set hours of operations (with a clock icon), and 3. Create queues (with a plus icon). Each step has a brief description, a "Learn more" link, and a "Begin" button for step 1.

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

Amazon Connect

Claim Phone number

Toll free DID (Direct Inward Dialing)

Country: +1

+1 833-631-2346

+1 833-622-1569

+1 833-579-2520

+1 833-441-1934

+1 833-631-2357

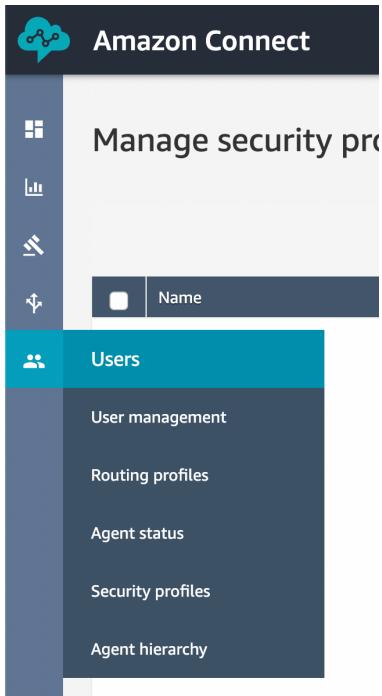
(i) Select toll free for a block of 1 (800) numbers or DID (Direct Inward Dialing) for local exchange carrier numbers.

- 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

- 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

The screenshot shows the 'Create security profile' dialog. At the top, it says 'Create security profile'. The main form has two sections: 'Name' and 'Description'. The 'Name' field contains 'Inbound', with a note below stating: 'This field is required, and can contain up to 127 characters: A-Z, 0-9, spaces, @, underscores (_), and dashes (-)'. The 'Description' field contains 'Only able to take inbound calls', with a note below stating: '219 of 250 characters remaining.' Below the form is a section titled 'Security profile permissions' with three tabs: 'Routing' (selected), 'Numbers and flows', and 'Users and permissions'.

- Give it name: Inbound
-

Security profile permissions

Routing 

Numbers and flows 

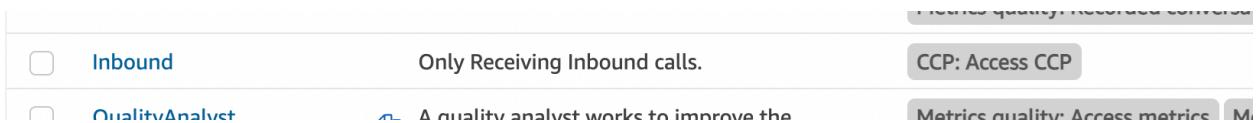
Users and permissions 

Contact Control Panel (CCP) 

Type	Access
Access Contact Control Panel	<input checked="" type="checkbox"/>
Make outbound calls	<input type="checkbox"/>

Metrics and Quality 

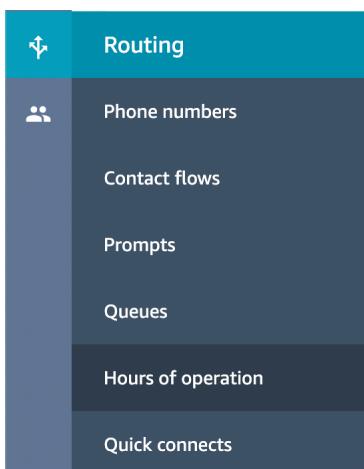
- To make it only able to access inbound calls, only click the box under Contact Control Panel, “Access contact control panel”
- If successful, the Manage Security Profile screen should have a new profile like this:



The screenshot shows the 'Manage Security Profile' screen. A new profile has been created with the following settings:

- Inbound** is selected (indicated by a checked checkbox).
- Access CCP** is checked (indicated by a checked checkbox).
- Quality Analyst** is also listed as an option.

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

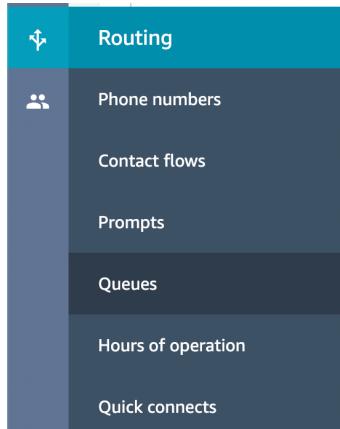
Day	Start	End
Monday	09 : 00 AM	05 : 00 PM
Tuesday	09 : 00 AM	05 : 00 PM
Wednesday	09 : 00 AM	05 : 00 PM
Thursday	09 : 00 AM	05 : 00 PM
Friday	09 : 00 AM	05 : 00 PM

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:

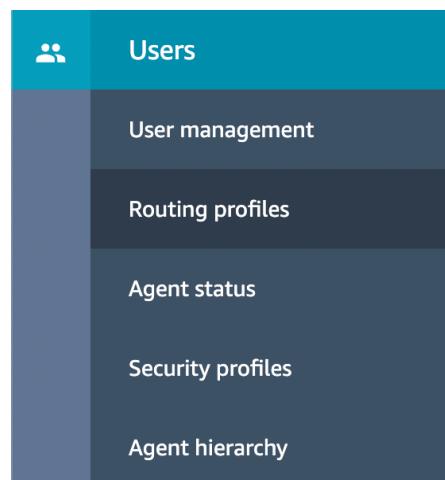
Name
Sales Queue

Description
Sales
245 of 250 characters remaining.

Show additional queue information ▾

Hours of operation Weekday 9 - 17	Outbound caller ID name Sales The name that will show up on the customer's phone
	Outbound caller ID number +1 416-941-3514
	Outbound whisper flow (optional)

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:

Name
Sales

Description
Routing profile
235 of 250 characters remaining.

Set channels and concurrency
Defines which channels agents can handle in the CCP
Note: If all channels are selected, agents will have access to only one channel at a time for inbound contacts.[Learn more](#)

Voice
 Chat
 Task

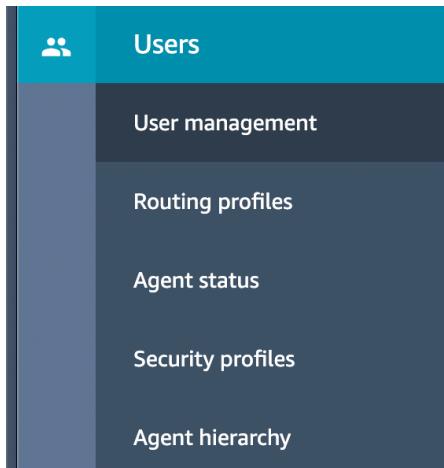
Routing profile queues
If no queue is added, the agent will only be able to make outbound calls. At least one queue is needed for inbound calls, and must not be a duplicate.

Name	Channels	Priority	Delay (in seconds)
Sales Queue	<input checked="" type="checkbox"/> Voice <input type="checkbox"/> Chat <input type="checkbox"/> Task	1	0

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

Sales	Routing profile	1	1
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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:

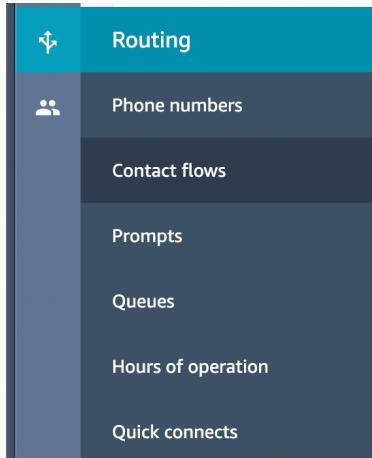
The screenshot shows the 'New User' form. At the top, there are fields for First name (Default), Last name (Dan), Login name (default1), and Email address (dd@gmail.com). Below these are fields for Password and Verify Password, both containing '*****'. In the bottom section, there are three tabs: 'Routing Profile' (Sales), 'Security Profiles' (Inbound), and 'Phone Type' (Soft phone selected, with Auto-Accept Call checked). There is also a note about After call work (ACW) timeout.

First name Default	Last name Dan	Login name default1	Email address dd@gmail.com
Password *****		Verify Password *****	
Routing Profile: <input type="text" value="Sales"/>		Security Profiles: <input type="text" value="Inbound"/>	Phone Type: <input type="text" value="Soft phone"/> <input checked="" type="checkbox"/> Auto-Accept Call After call work (ACW) timeout:

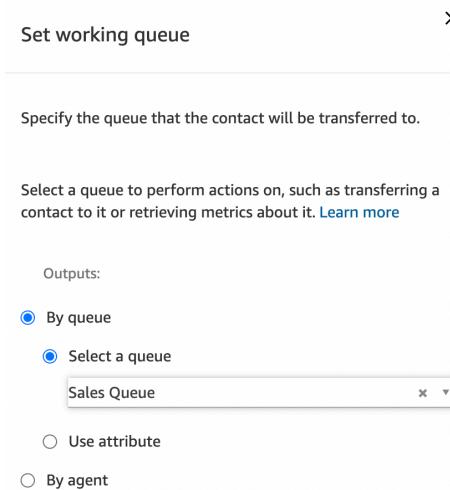
- If everything's correct you can press save at the bottom
- User will appear in user Management alongside your admin

Login name	Name	Routing profile	Security profile	Agent hierarchy
<input type="checkbox"/> default1	smith, john	Sales	Inbound	—
<input type="checkbox"/> iamtom1	Zhang, Tom	Basic Routing Profile	Admin	—

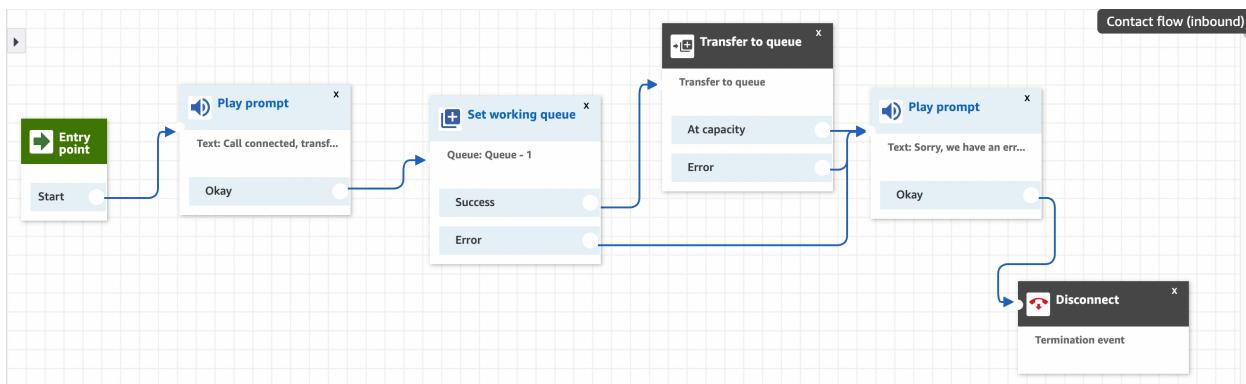
9 - Create a call flow



- 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.